Caregiving ERG Toolkit

By the **ELEVATE** Team

Welcome!

If you're reading this, you're curious about how your organization can be one where caregivers can thrive in their careers.

The issue has never been more pressing. A recent Harvard study tells us that now 73% of employees have caregiving responsibilities, and that rate will rise as our population ages, retirement age moves later, and younger employees become members of the 'sandwich generation' caring for both children and aging loved ones. This creates major risks and opportunities for employers, who must now consider it a key business strategy to address the needs of their employees with caregiving responsibilities. C-suites around the nation 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 with caregiving responsibilities. 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 create a caregiving ERG initiative, 2) start a new ERG for caregivers, and 3) build an initiative about caregiving across all of 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 caregiving@aarp.org.

We are grateful for the partnership of Spectrum Knowledge and Workable Concept who partnered with AARP to create this toolkit for you.

Warm regards,

Bob Stephen
Vice President, Health and Caregiving

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Introduction

Chances are, most of us are or know caregivers.

Caregivers run the diverse gamut across ethnicities, genders, generations, sexual orientations, and other career related affinities that are often engaged with ERGs. Your ERGs can play a pivotal role in supporting the careers of all employees with caregiving responsibilities. Most importantly, your organization will be more successful when it can recruit, retain, and promote caregivers by ensuring they can thrive professionally within your organization. It's good for your people, your culture, and your bottom line.

Why is this Caregiving ERG Toolkit valuable?

Think of your ERGs as key strategy to: enable critical employee groups to gain a sense of belonging in your organization, to join a community of support, and to benefit from targeted efforts to recruit, retain, develop and promote employees who are often underrepresented in senior leadership positions. This toolkit offers practical, actionable ideas to help you:

Understand and support caregivers: Leverage the toolkit to create ways for your organization to understand what employees with caregiving responsibilities need in order to successfully pursue their professional ambitions within your organization.

Develop leadership skills among caregivers: Organizations that support ERG leadership development are up to 5 times more correlated with high-performing organizations when compared with their low-performing peers. Harness this power of ERGs to support caregivers by providing resources to build their leadership and professional skills and their networks.

Recruit and retain caregivers: Having a thriving Caregiving ERG initiative sends a strong signal to prospective and current employees that they belong in your organization, have a community of support, and can access key leadership development opportunities to ensure a compelling career path in your organization.

Quick Terminology Note

Throughout the Toolkit, we refer to "ERGs," which are Employee Resource Groups. Organizations have their 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.
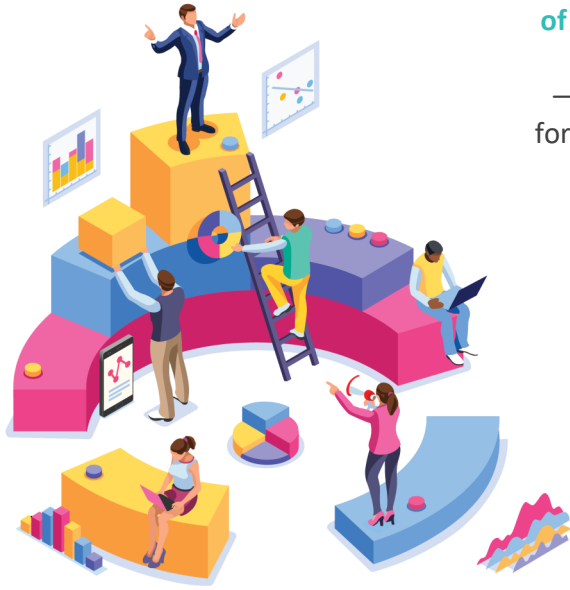
Section I

Why Will a **Caregiving ERG Effort** Drive Your Organizational Goals?

In This Section

As you strengthen your Diversity, Equity and Inclusion efforts at your organization, remember that **over 70% of your employees are likely members of a group that is under-supported by current D&I efforts** —yet they are more likely to drop out of your pipeline for recruiting, developing, retaining and promoting into senior leadership roles.

This same group likely has exactly the characteristics you want to build in your workforce —namely the ability to collaborate with peers, be empathetic leaders, work with heightened efficiency, and be loyal to you as an employer with values that are aligned with their own. This employee population is **inclusive and intersectional—literally any employee may identify as a member of this key group** (even those who are sometimes less likely to see how D&I initiatives personally apply to them).

These are caregivers. Your working parents. Your Millennial employee taking care of his mom with Multiple Sclerosis or his brother with Downs Syndrome. Your Gen X employee caring for teenagers and their parents at the same time. And even your younger employees who are not yet caregivers. You may not realize it, but they are already making decisions about when to start their own family during their career with you —or are already planning to go work somewhere else where they can see a path to thrive as both a professional and as a caregiver.

That's why it's critical for your D&I efforts to specifically address and support caregivers as a unique employee population that is critical to your organization's ability to achieve not only your D&I goals, but your overall business and organizational success.

Unit I

Why Are Caregivers A
Key Employee Population
To Support With Our
D&I Efforts?

GOAL:
To advance your understanding of
caregiving as a strategic imperative
for achieving your organization's
strategic goals.

Your Employees Have a Secret Second Job

You may be surprised about the diversity of caregivers on your team, how often they hide their caregiving role from their employers, and the powerful results that even simple employer support can drive.

Nearly all of your employees will be caregivers at some point

26.2M people in the U.S. are employed and are family caregivers.

73% of employees are likely to have caregiving responsibility for a loved one today, whether for a child and/or an adult.

60% of working adults anticipate needing to take time off in the future to care for a child or an adult family member.

30% of U.S. workers say they will need to take care of a child, and **51%** anticipate needing time off in the future to care for a sick, disabled, or elderly family member. Men anticipate needing this leave at statistically similar rates as women.

21 hours of unpaid care per week is average for a family caregiver. That's on top of working!

Check your assumptions about who they are

1 in 4 working family caregivers is a Millennial, and **1 in 2** is under age 50.

Nearly **40%** of family caregivers are men.

9% of caregivers in the U.S. self-identify as LGBTQ.

46 is the average age of a family caregiver, who is often in the **"sandwich generation"** caring for both their children and an aging loved one.

Lenhart, A. (2019, December 4). *Lifting the Barriers to Paid Family and Medical Leave for Men in the United States.* New America

Smolkin, S. (2017, October 9). *Innovative employers enhance caregiver benefits.* Employee Benefit News

Family Caregiver Alliance. (2019, April 17). Caregiver Statistics: Demographics. National Center on Caregiving

Your employees are reluctant to tell you about their caregiving responsibilities

Only 53% of caregivers report that their supervisor is aware of their caregiving responsibilities—down from 56% in 2015.

Millennials are the least likely to tell their employers.

46% of Millennial caregivers tell a supervisor about their caregiving commitment—even though 54% of Millennial caregivers say caregiving has significantly affected their work and 30% have an annual household income under $30,000 and so really feel the crunch of care giving related expenses.

4.3 years is the average care provided by family caregivers (that's a time to navigate work without asking for or receiving support from their employer).

70% of working caregivers report work-related difficulties due to their dual roles.

Taking action to increase caregivers' sense of belonging could be your highest ROI HR decision this year

80% of Millennial employees would leave their current employer to join an organization with better family friendly benefits (and remember that Millennials will be 75% of the US workforce by 2025).

Even though employees who receive caregiving support from their employer are 30% more likely to stay with their employer, only
53% of employers offer flexible work hours/paid sick days,
32% offer paid family leave,
23% offer employee assistance programs, and
22% allow telecommuting regardless of employee caregiving burden.

Helping employees address their personal caregiving obligations is an approach employers almost entirely overlook as a mechanism for maximizing employee productivity and minimizing turnover, according to researchers from Harvard Business School.

Family-friendly policies actually drive your profits. Research shows that employers can yield higher profits by making family-friendly policies more accessible, because the overall availability of benefits is associated with higher margins.

Family Caregiver Alliance. (2016). *Caregiver Statistics: Work and Caregiving.* National Center on Caregiving

National Alliance for Caregiving (NAC) and the AARP Public Policy Institute (2015, June). *Caregiving in the U.S. 2015*. AARP

Kashyap, V. (2019, March 5). *Work-Life Balance Is Dead! (Working Parents Need Help Navigating The Workplace).* ProofHub

HBS Working Knowledge (2019, February 7). *How Businesses Can Support Their Caregiving Employees.* Forbes

AARP and ReACT. (2016, April 1). *Determining the Return on Investment: Support Policies for Caregivers.* Respect Caregivers Employees. Forbes

Caregiving Intersects With All Other D&I Focus Populations—and Limits Their Ability to Advance in Your Organization

Caregiving is an intersectional issue in the workplace, and it plays out differently for unique populations.

Yet across all employee identities there is a common obstacle to advancing in the organization —a lack of policies, culture and tools to integrate work and life as a caregiver.

Women literally pay the price

Caregiving fuels the gender wealth gap. Working female caregivers may suffer a particularly **high level of economic hardship** due to caregiving.

$325,000 in lost wages and Social Security benefits.

$40,000 less saved for retirement compared to men who are caregivers.

Whether or not they want to, women spend **50% more time** providing care than male caregivers. Thus, female caregivers are **more likely** than males to have to make alternate work arrangements.

Citing conflict between work and caregiving:

33% of women decreased their hours,

20% switched from full-time to part-time,

29% passed up a promotion, training or assignment.

The "Motherhood Penalty" is real. It is driven by **unconscious bias** that women are better caregivers than men. It's likely these same gender biases are in play for working family caregivers, too.

Mothers are perceived as **12% less** committed to their jobs than non-mothers. While fathers are perceived as 5% more committed to their jobs than non-fathers.

8% lower recommended starting salaries for mothers than non-mothers, while fathers' recommended starting salaries are slightly higher than for non-fathers.

8x more likely for childless women to be recommended for a promotion than mothers.

Employers pay too. It costs them **$3.3 billion annually** to replace women who quit their jobs because of their job's incompatibility with their caregiving responsibilities.
(That's likely more than it would cost to build in the remote work, flexible scheduling, and manager training that is proven to retain these women!)

MetLife Mature Market Group, National Alliance for Caregiving (2011, June). *Caregiving Costs to Working Caregivers: Double Jeopardy for Baby Boomers Caring for their Parents. NAC*

National Alliance for Caregiving (NAC) and the AARP Public Policy Institute (2015, June). *Caregiving in the U.S. 2015.* AARP

Correll, S. J., Benard, S., & Paik, I. (2007, March). *Getting a Job: Is There a Motherhood Penalty?*
1. American journal of sociology, 112(5), 1297-1339.

Men need you to give them social permission to be caregivers

Men are not treated as equal caregivers. Social norms in many organizations falsely assume that men are the sole family earners, and that they are **not equal caregivers** for either their children or aging loved ones.

73% of fathers think there is little workplace support for them.

69% of fathers would change jobs to spend more time with their families.

Unconscious bias affects men as caregivers. Although research shows that the "Fatherhood Bonus" means male caregivers receive higher pay and are more likely to be promoted, it also shows that managers assume **men don't want to—or aren't good** at providing care for their loved ones.

26% of managers encourage men to take family leave.

62% of men take the full leave for which they are eligible, while 93% of women take the full leave for which they are eligible.

21% fear losing their jobs if they use their full leave even though 89% men want to take family leave.

Men are reluctant to ask for support. Among caregivers, men are significantly less likely than women to ask their supervisors for accommodations such as flex-time or telecommuting. When they do ask for accommodations, they are more likely than women to receive

Cline, J. (2019, June 12). *10 Reasons Every Company Should Offer Paid Paternity Leave (And Every Father Should Take It).* Catalyst

Munsch, Christin. (2016). *Flexible Work, Flexible Penalties: The Effect of Gender, Childcare, and Type of Request on the Flexibility Bias.* Social Forces. 94. 1567-1591. 10.1093/sf/sov122.

LGBTQ employees need employers to include their families

LGBTQ people become caregivers at a higher rate than non-LGBTQ people **(1 in 5 vs. 1 in 6)**

Due to oversights in how policies are written, LGBTQ caregivers **may not be receiving** the same family leave, family-building medical coverage, dependent care, or other benefits that other employee caregivers receive.

Male LGBT caregivers report providing **41 hours of care** per week. That's more than the 29 hours/week by non-LGBT males hours, and more than female LGBT caregivers' 26 hours/ week. (And still on top of the hours they are working for you!)

LGBTQ caregivers are more likely to be caring in isolation and more likely to be in the same age range as the people for whom they are caring.

African American employees are often younger and spend more of their income on caregiving expenses

57% of African American caregivers have a high 'care load' and spend on average **30 hours/week** providing care.

43 is the average age of African American caregivers which is younger than for the average population.

Over 50% of African American caregivers are in the **"sandwich generation"** taking care of both aging adult and children.

More than 34% of African American caregivers' annual income is devoted to expenses associated with providing care compared with 14% for white caregivers.

More likely to reside with the care recipient. The majority personally provide all or most of the care.

Munsch, Christin. (2016). *Flexible Work, Flexible Penalties: The Effect of Gender, Childcare, and Type of Request on the Flexibility Bias.* Social Forces. 94. 1567-1591. 10.1093/sf/sov122.

MetLife. (2010). *Still Out, Still Aging: Study of Lesbian, Gay, Bisexual, and Transgender Baby Boomers.* SAGE

National Resource Center on LGBT Aging. (2018, May). Fact Sheet: LGBT Caregiving. SAGE

National Alliance for Caregiving (NAC) and the AARP Public Policy Institute (2015, June). *Caregiving in the U.S. 2015.* AARP

Latinx employees are likely to have a high 'care load'

Highest reported rate of caregiving among any other racial or ethnic group.

45% of Hispanic caregivers have a high 'care load', spending **32 hours/week** caregiving in addition to working (versus the 33% of whites who have a high care load and spend 20 hours/week caregiving).

Often **do not self-identify** as 'caregivers' as their responsibilities are often considered seamless elements in their family roles as daughters, sons, siblings or grandchildren.

Less likely to utilize formal caregiving support because of costs and lack of awareness about available resources.

Asian American and Pacific Islanders often focus on caregiving at home

2x more likely to care for elders than the general population of the same age.

17% of AAPIs live in multigenerational households, compared to 7% for total population.

More likely to prefer to care for their elders at home and to opt out of institutional care.

72% of AAPI's feel they should be doing or should have done more for their parents.

Cruz, Y. (2017, April). *Hispanic Family Caregiving: Proceedings from a Thought Leaders Roundtable*. National Hispanic Council on Aging

Alzheimer's Association and National Asian Pacific Center on Aging. Strengthening Community-Based Services for Asian American and Pacific Islanders Affected by Dementia

Montenegro, X. (2014, December). *Caregiving among Asian Americans and Pacific Islanders Age 50+.* AARP

Caregivers Highly Value
Professional Development Opportunities

Caregiving develops the skills you want your leaders to have

The first five months of being a primary caregiver drives a **burst of neuroplasticity** (rewiring of the brain) that is similar in intensity to brain development between ages 0-3!

Because of this brain plasticity, the experience of caregiving literally builds the skills you want in your leaders—collaboration, empathy, emotional regulation, and the ability to give and receive feedback.
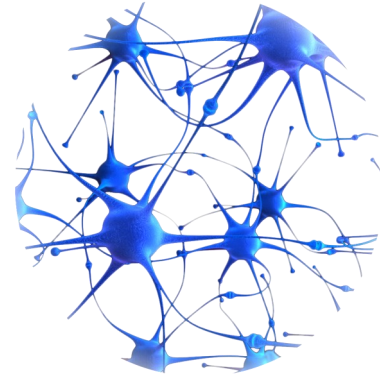
91% of CEOs believe empathy is directly linked to a company's financial performance. And research shows that engaged caregivers are likely to develop "an enhanced capacity to anchor feelings in the present moment, resonate with others' pain and emotions, and collaborate well with others."

Caregivers are wired for a **growth mindset**, and research shows that employees with a growth mindset are more likely to:

- Acquire new skills,
- See their colleagues as trustworthy and
- Believe their company supports risk-taking and innovation.

Henderson, A. (2018, June 15). *Fatherhood Makes Men Better—at Work and at Home.* Slate

Business Solver (2019, March 27). *2019 State of Workplace Empathy Study*

Henderson, A. (2017, September 12). *5 Reasons Why Motherhood Makes Us Better Workers.* Mother Mag

Dweck, C. S. (2006). *Mindset: The new psychology of success.* Random House

Caregivers are highly receptive to targeted, practical opportunities for professional development

Caregivers are **just as likely** as non-caregivers to aspire to senior leadership positions. In fact, a recent Accenture study found that mothers are more likely than women without children to change jobs for a promotion or higher pay.

Caregivers are **30% more likely** to stay with employers who provide support. Build on this by creating Professional Development (PD) opportunities designed to secure high participation by working caregivers, such as short content-efficient trainings or online professional development opportunities.

Caregivers are **more likely to respond** to mentorship, particularly when paired with a mentor who is or has been a working parent/caregiver, as seen in a JPMorgan Chase's recent Maternity Mentors program.

Caregivers are a **natural fit** for managerial training that builds on their core skills of empathy, change management and collaboration.

Caregivers can be among the **strongest** managers, with **high loyalty** from their direct reports, and **highly efficient** teams. Research shows that managers who would sacrifice other goals to spend more time with their families actually have significantly better performance reviews from their supervisors, peers and direct reports than those who would not.

JP Morgan Chase & Co. (2020, March 23). *Matching mothers to mentors: Working moms get the support they need.* The Washington Post

Henderson, A. (2017, September 12). *5 Reasons Why Motherhood Makes Us Better Workers.* Mother Mag

Forbes Staff (2007, February 27). *Do Parents Make Better Managers?* Forbes

Why Do We Need an ERG Effort Focused on Caregivers as a D&I Focus Population?

If you look hard at where employees across your D&I efforts plateau in your organization, you're likely to find issues related to how your workplace forces them to choose between caring for those they love and doing the work they love. That's why you need a Caregiving ERG initiative to understand and address those opportunities to improve your workplace.

A Caregiving ERG can build wide support for overall D&I initiatives because it can include any employee from any racial, ethnic, gender identity or orientation, religious identity, or level in the organization

- A Caregiving ERG initiative can help your organization understand and address how to make your workplace one where caregivers can have the same career opportunities as non-caregiving employees.

- Research shows it is critical to the overall success of D&I efforts to ensure every employee can join and ERG as a member of ERG's identity group, rather than as an ally. This is especially true for middle managers— when managers don't personally identify with other ERG groups, they are less likely to see how D&I efforts support rather than penalize them personally, are less likely to buy into overall D&I efforts, and have an organizational position where they can undercut all D&I efforts either consciously or unconsciously.

- Strategically, a Caregiving ERG could be the only ERG offered where nearly every employee can engage in a role grounded in their own identity
  (e.g. I'm a dad also caring for my mother-in-law) rather than their roles as allies
  (e.g. I'm a straight ally supporting LGBTQ employees).

To set up your Caregiving ERG initiative for success:

1

Structure the group to welcome and engage men who are caregivers, which research shows helps support women's advancement in the organization.
(For example, do not structure a Caregiving initiative as a group within a Women's ERG or as a Working Moms' ERG.)

2

Build the group to engage all generations who are caregivers. Your Gen Z and Boomer employees may first bond over caregiving, but grow into two-way mentorship over time.

3

Have gender-diverse, generation diverse and racially-diverse leadership of the Caregiving ERG initiative to signal from the start that it is for everyone, and to create the most value for the organization.

The employee populations that most D&I efforts support are often the groups that are hit hardest by caregiving

Addressing caregiving will boost the success of your other D&I efforts to recruit, develop, retain and promote employees in your key D&I focus populations.

Don't let caregiving be the reason these employees drop out of your promotion pipeline.

Engage Employees Strategically

1

Engaging your LGBTQ employees to address caregiving will likely bring more men into your Caregiving initiative and **bring balance**, as male LGBTQ caregivers are likely to have a higher care load than non-LGBTQ males.

2

Engaging your African-American ERG to brainstorm how your organization can support caregivers' financial planning and use of benefits can **reduce stress** among an employee population that may be spending over a third of their income on caregiving-related expenses.

3

Addressing the LatinX community's likelihood of spending over 30 hours/week caregiving will have positive effects on their ability to **accept an opportunity** for big projects, promotions or travel assignments that are key to advancing professionally.

4

Engaging your AAPI employees to brainstorm support for multi-generational households, which they are more likely to live in as they care for seniors at home, may create **new opportunities for all employees** to work more flexibly.

What's the Return on Investment for a Caregiving ERG Initiative?

ERGs can lead and serve as powerful agents of change that can drive business impact and develop diverse talent. Research by Elevate and i4cp demonstrates that high performance organizations develop their ERG leaders, which in turn results in significant return on investment (ROI).

High-performance organizations can achieve an amazing 1200% 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
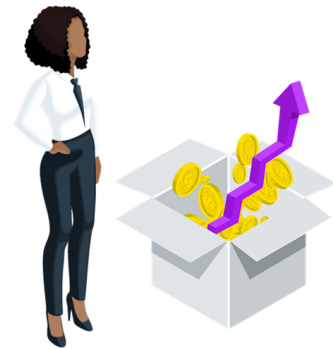
Low-performance organizations achieve much lower ROI on their ERG efforts, and are:

3.5x more likely to say they do not look at ERGs as a source or training ground for future leaders

3x more likely to provide no training

In high-performance organizations, ERG leaders report benefits that accelerate their leadership development

3x more likely to cite the ability to strategically impact business results

2x more likely to cite exposure to senior leaders and increased opportunity to build 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

1

82% cite exposure to and recognition by senior leaders

2

58% cite opportunity to champion others

3

54% cite exposure in other organizational departments/silos
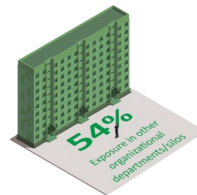
4

52% cite increased opportunity to build external reputation

McGraw, M. (2018, October 23). *New I4CP Report Reveals ERGS as Effective Leadership Development Tool.* I4CP

The most effective ERGs have sponsors who coach and sponsor group members for ERG leadership roles

63% of high-performance organizations expect sponsors to coach or mentor ERG leaders

5x more high-performance organizations expect sponsors to observe and source ERG members for leadership potential

2x more high-performance organizations see the executive sponsor role itself as a leadership development opportunity

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

3x more likely to assess or review ERG effectiveness at 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

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

American Sociological Association, "Diversity Linked to Increased Sales Revenue and Profits, Customers," April 3, 2009. | CEB, "Driving Retention and Performance Through Employee Engagement," Arlington, VA, 2008. | Credit Suisse Research Institute, "Gender Diversity and Corporate Performance," July 31, 2012. | Forbes, "Patenting the Co-Ed Code," September 13, 2007. | Hewlett, Sylvia Ann, Melinda Marshall and Laura Sherbin with Tara Gonsalves, "Innovation, Diversity & Market Growth," Center for Talent Innovation, 2013. | National Center for Women & Information Technology, "Who Invents It? Women's Participation in Information Technology Patenting," 2012. | Rock, David and Heidi Grant, "Why Diverse Teams are Smarter," Harvard Business Review, November 4, 2016. | Fuhrmans, Vanessa, "Companies With Diverse Executive Teams Posted Bigger Profit Margins, Study Shows," The Wall Street Journal, January 18, 2018.

Put It in Action

1. **Do you need help explaining to your leadership** why you think your organization needs a Caregiving ERG initiative? Here's an email template you can use to ask for the initial meeting:

   Dear [HR leader or C-suite leader].

   I'm reaching out because I'd like to schedule time to share an idea that could help our organization recruit, retain, develop and promote a diverse range of team members. I recently read that 73% of current employees currently provide care for a loved one outside of work, which is an astounding figure. In addition, only 53% of managers are aware of their employees' caregiving responsibilities.

   These working parents and working family caregivers are navigating challenges that make them more likely to drop out of our pipeline for promotion, but research shows they will be 30% more likely to stay if they feel supported. An employee-driven effort to create a Caregiving initiative in in our [ERG/ BRG/ affinity group] could make a real difference for our colleagues, but also for our organization. Research shows that the ROI of an ERG initiative can be close to 1200%.

   Can we find a time in the next two weeks to talk about creating a Caregiving effort in our [ERG/ affinity group] initiatives? I'll bring some research data around caregiving and D&I efforts, and frame a few options for how we could approach this opportunity.
   Looking forward to hearing from you,

   [Your Name]

2. **To make it easy,** here's a link to an editable presentation on *Why We Should Consider a Caregiving ERG Initiative* that you can use to guide conversation.
   → https://www.workableconcept.com/blog

3. **Find data for your current organization to help make your case to become more "caregiver friendly."** Use this interactive tool to assess how "Caregiver friendly" your organization is right now. As you answer the questions, you can see benchmarks for each one. This gives you data you can use to talk with HR and your senior leaders.
   → https://nebgh.org/initiative/caregiving/

4. **Work with your HR team or your own team leadership to invite a broader group into the conversation** by using resources from the NEGBH/AARP Toolkit for Supporting Employee Caregivers.
   → https://nebgh.org/initiative/caregiving/

Unit II

Choosing The **Best Structure** For Your Caregiving ERG Effort

GOAL:
To help you choose the best structure for building a Caregiving ERG initiative in your own organization.

What's the Best Approach to Building Our Caregiving ERG Effort?

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

1 **Build a dedicated ERG for caregivers**

This includes starting a new ERG for Caregivers or broadening your current Parenting ERG to become a Caregiving ERG inclusive of family caregivers for adult loved ones, too.

Caregiver ERG

2 **Integrate caregiving initiatives into current ERGs**

Integrate ongoing Caregiving initiatives as a collaboration across all ERGS and/or within each ERG to support caregivers of that group.

PRIDE ERG   **African American ERG**   **Women's ERG**

Option 1: Build a dedicated ERG for caregivers

What is this approach?

- Start a new ERG focused on Caregiving, with a broad umbrella to support all types of caregivers—anyone who provides care for a loved one of any age.

OR

- Expand an existing Parent ERG to become a Caregiver ERG, with a broader umbrella that includes all types of caregivers—anyone who provides care for a loved one of any age. The work-life challenges and professional development experiences are often similar no matter who the employee is caring for, so the same ERG network of support can benefit all caregivers.

What are pros and cons of a building a dedicated ERG for Caregivers?

	Pros	Cons	
	It can be a way for those in managerial roles to be actively engaged in D&I efforts beyond allyship roles – and they can make or break other D&I efforts in your organization.	Caregivers by nature have very little free time, so it may be harder to find caregivers who are able to take on leadership roles in the ERG.	
	Acknowledges that many parents are now (or soon will be) caregivers for adult loved ones, too, and so supports their caregiving role 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. Nursing Moms Support Group)	
	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 slightly reduce funding for other ERGs.	
	If ERGs provide customer insights for your business, this is a more efficient way to gather input from caregivers as a customer segment.	If ERG member insights are not used for either development of internal initiatives to address challenges, or for customer insights, members can feel their experience as a caregiver is not really valued by the organization.	
	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.

Option 2: Integrate caregiving initiatives into current ERGs

What is this approach?

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

What are pros and cons of integrating a caregiving initiative across all current ERGs?

	Pros	Cons	
	Can be easier to get up and running quickly, without finding new budget, executive sponsors, and ERG leaders.	Does not offer a pathway for employees who do not personally identify with members of another ERG to join the Caregiving initiative.	
	Ensures that the aspects of caregiving that are unique to specific affinity groups are openly discussed and addressed.	Does not engage a dedicated executive sponsor for Caregiving, which limits the cultural messaging about senior leadership's support for and experiences as working caregivers.	
	Since caregiving affects members of all ERGs, ERGs can work together to implement all-organization manager training for managers of caregivers (use AARP's free online training!)	May be harder to sustain caregiving 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 caregiving uniquely affects their employee engagement, recruitment, retention and promotion. This can substantially strengthen success across these areas.	All of 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 a Caregiving-focused 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.

How You Can Make a Choice That Fits Your Organizational Goals

As you decide how to structure your Caregiving ERG efforts, here are some areas to consider. Print and use this as a meeting agenda first with your small working group, and 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 organizations stated D&I goals for the coming 1-3 years?
How could each structure of Caregiving 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 five ways it would it be valuable to your recruitment efforts to show that you have a dedicated ERG for caregivers?

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 D&I efforts? If not in a dedicated Caregiving ERG, where else will they join as identity-based members rather than as allies?

6. How likely are you to sustain Caregiving initiatives if they are embedded in other affinity groups?

7. How might your approach change as your organization evolves over time?

Put It in Action

Now it's time for a follow-up conversation with your HR leader and other key influencers about how to structure your Caregiving ERG effort.

1. To make it easy, use the discussion questions on the previous page as your agenda. Come prepared with your own thoughts on each question.

2. Use this editable presentation *How to Structure our Caregiving ERG Initiative*: *A Discussion Guide to Use with Leadership* to guide the conversation and help you identify next steps and owners before the end of the meeting.
   → https://www.workableconcept.com/blog

Section II

How to **Kick Off**
Your Caregiving ERG Effort

In This Section

So, you've decided you want to create a Caregiving ERG effort, and you have
ideas about how you want to structure it—either as a dedicated Caregiving ERG or as a Care-
giving 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
Spectrum Knowledge.

2 Second, design your first year of initiatives
and/or events to create the value for your
organization that will inspire your leaders to
invest more heavily in year 2.
Use our suggestions of Caregiving ERG efforts
that can develop the careers of your working
parents and family caregivers.

Unit III

The **ERG Startup Stairway**

GOAL:
To provide a structure for you to successfully develop a plan to create a new Caregiving ERG or to thoughtfully extend an existing ERG to broaden focus to support all types of caregivers.

Use Elevate's Best Practices to Launch Your ERG Effort

Remember that ERGs have a wide range of life stages. Your planning will reflect which stage your organization is in right now. Keep your own stage in mind as you work through the ERG Startup Stairway worksheets on the following pages.

Stages

Stage 1

Stage 2

Stage 3

Stage 4

Components

Key Activities

- Heritage & cultural events
- Social hours
- Community involvement

- Professional events & networking
- Employee development focus

- Talent development aligned with business goals
- Community involvement, outreach & forming partnerships
- Recruiting

- Executive leaders view ERGs as business partners
- Established Strategic Plan, Succession Plan, Knowledge Management Plan

Systems & Processes

- Organic growth driven by passion of founders
- Ad hoc processes

- Engages growth & driven by passionate board
- Established processes

- Leveraged by executive leadership
- Proven organizational

- Product innovation
- Leveraging capability to capture new

Governance

- Unofficial or informal
- Little or no governance structure
- Executive Acknowledgement

- Officially recognized by executive leaders
- Basic organizational structures & by laws
- Executive Sponsors

- Empowers growth & driven by passionate board & members
- Established tactical plan

- Advisor to executive leadership
- Mentor other associations

Successful ERGSs move thoughtfully through key steps, as shown in the ERG Startup Stairway.

6 Success Measures
5 Strategy
4 Stakeholders
3 Structure
2 State
1 Shared Values
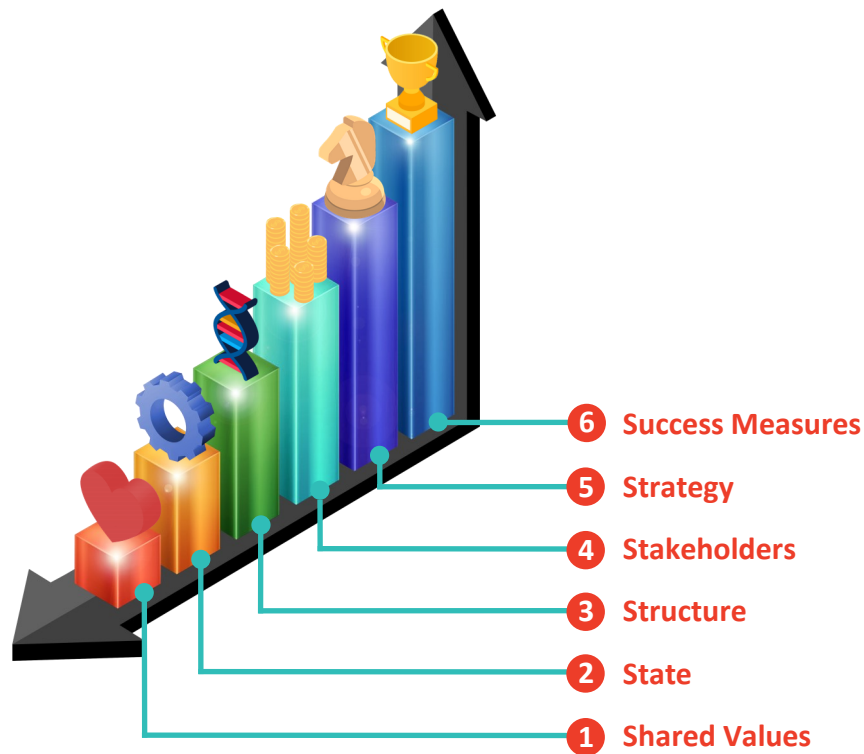
Use the Startup Stairway to guide decision-making. With your group, choose the most relevant questions listed for each step. Discuss with your startup team, summarize your thoughts, and use that summary to frame discussions with key organizational decisionmakers. Remember these tips:

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.

1 Shared Values

Shared values are the core affinity, cause and purpose that binds your ERG leaders and members.

Purpose

☐ What is your ERG's purpose?
☐ Why does it exist?
☐ What would make your group dedicate, and even sacrifice, certain comforts toward positive change for the greater good?
☐ What motivates your ERG?
☐ As an ERG contributor, what would attract you to get up and change your surroundings? How would this make you feel positive almost every day about what you are doing?
☐ Congratulations! Your "yay" job with your ERG just shifted to your full-time, "day" job. Which factors top the list to make you want to dedicate your volunteer energy to it?
☐ If your ERG ceased to exist, what legacy would your group leave?

Vision

☐ What does an ideal future look like to your ERG?
☐ As your future self, what would you look upon to say, "we've really grown greatly and have come a long way!"
☐ What would you want others to praise your ERG for with its future accomplishments?
☐ Where do you see your ERG in 1 year? 3 years? 5 years? 10 years? 20 or more years?
☐ If you were exponentially bolder, what would your ERG do and achieve?
☐ What are the differences and intersections of your group's vision with your broader organization's vision? How can you align these?

Mission

☐ What are your ERG's actions that in which it will engage consistently?
☐ What are your actions changing?
☐ How do we achieve what we do?
☐ What are your ERG's "bucket list" top-3 activities that would help it achieve its vision?
☐ How does your ERG's mission intersect with, and align to, your larger enterprise's mission?
☐ Finally, you can focus on: What is the mission of your group?

Values

☐ What are the common values of your ERG?
☐ What core beliefs do your ERG hold?
☐ Do a few, specific nuances distinguish your group's values from other groups?
☐ What issues and "burning platforms" do your founders and leaders hold near and dear to your heart?
☐ How do your values align and differentiate with your larger organization?

Affinity

☐ On what affinity base does the ERG focus? This could consist of a Cause, Culture, or Career Profession/Trade.
☐ Who is our ERG's target audience?
☐ Why does our ERG serve this target audience?
☐ Detail the difference in your ERG's affinity, as contrasted with other affinities?

2 State

State includes the current contexts and environments in which your ERG will operate, along with needed resources.

Challenges, Opportunities, Goals & Solutions

What are your ERG's challenges, opportunities, goals and solutions?

- **Challenges:** Define the top challenges that your ERG attempts to address.
- **Needs:** What needs gaps does your ERG fill?
- **Underserved:** Are there underrepresented, underserved or underprivileged groups that your ERG supports?
- **Friction and Conflict:** Many avoid friction, let alone conflict. Be sure to collaborate with your enterprise to ensure it stays within the guardrails.
- **Opportunities:** What opportunities exist for your ERG to grow and develop? Are there niche or overlooked areas of opportunity that your ERG can support, whether internal or external to your enterprise?
- **Development:** How can your group's leaders and members grow and develop by participation in the group?
- **Solution:** What solution areas can your ERG provide that others may not have? Start with the end in mind and work backwards with the solutions. Are the solutions short-term or long-term ones? Keep in mind that short-term solutions are valuable, as long-term ones may not be achievable by your ERG.
- **Magnitude:** Consider the magnitude and scale of your ERG's solutions. Are they within your organization or external? How many or to what magnitude can your ERG make an impact?
- **Appreciation:** What would make your target audience, population served, and organization grateful? These can drive your COGS.

Resources

What resources does your ERG need vs. want?

- **Volunteers:** How will you recruit volunteers? And how will the organization recognize their time investment and ERG successes?
- **Funding:** What funding do you need in Year 1 to achieve your goals?
- **Space:** Meeting and event space are valuable, often under-appreciated resources.
- **Services:** These include technology (hardware and software, from platforms to operations-based tools), shared services from functional departments (Diversity & Inclusion, Human Resources, Communications & Marketing, Accounting & Finance, Legal, etc).
- **Flex Time Or Charge Hours:** These are the allocated, even paid hours that your organization invests in your ERG. Minimally, volunteer flex time still provides a very valuable resource to your group.
- **Advice:** This is a resource that often goes undocumented. This can come from brief advising to ongoing mentoring and coaching.
- **Systems:** ERGs often reset with new leadership, so knowledge management, from capture to transfer, can prove wonderful resources.
- **Communication Channels:** Generally intangible and often invisible, these resources can come from electronic distribution networks to other people networks.
- **Senior Level Sponsors/Supporters:** Key people to gaining resources and access to influence organizational decision making on proposals the ERG may develop.
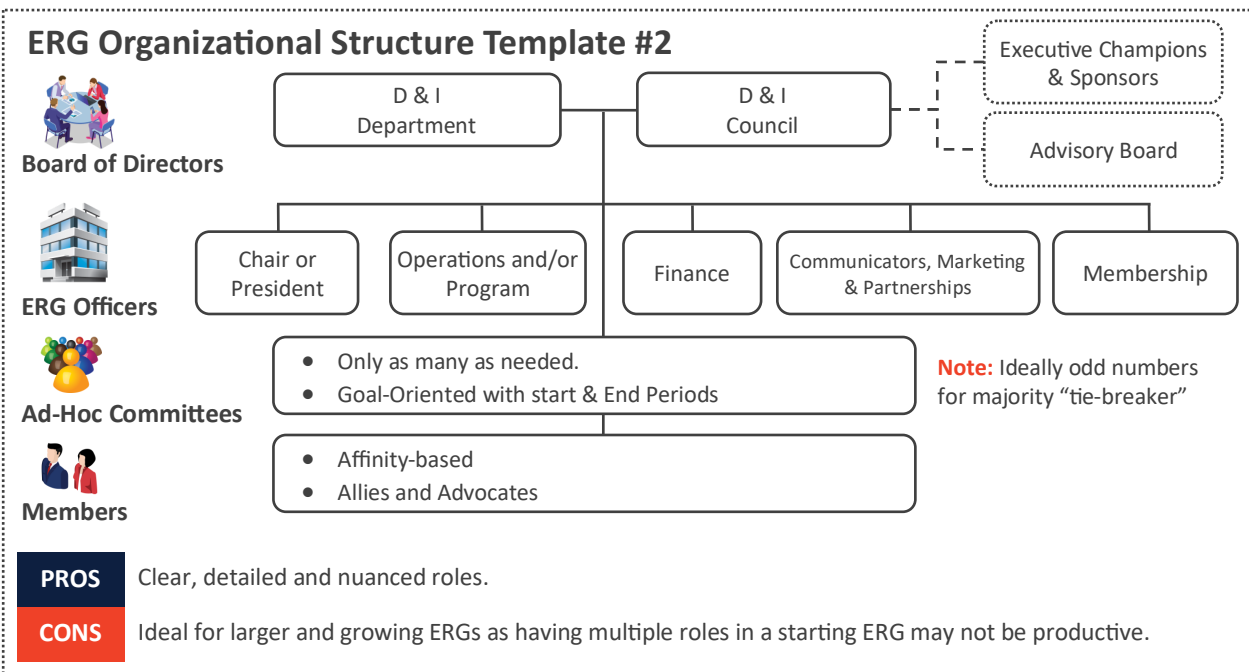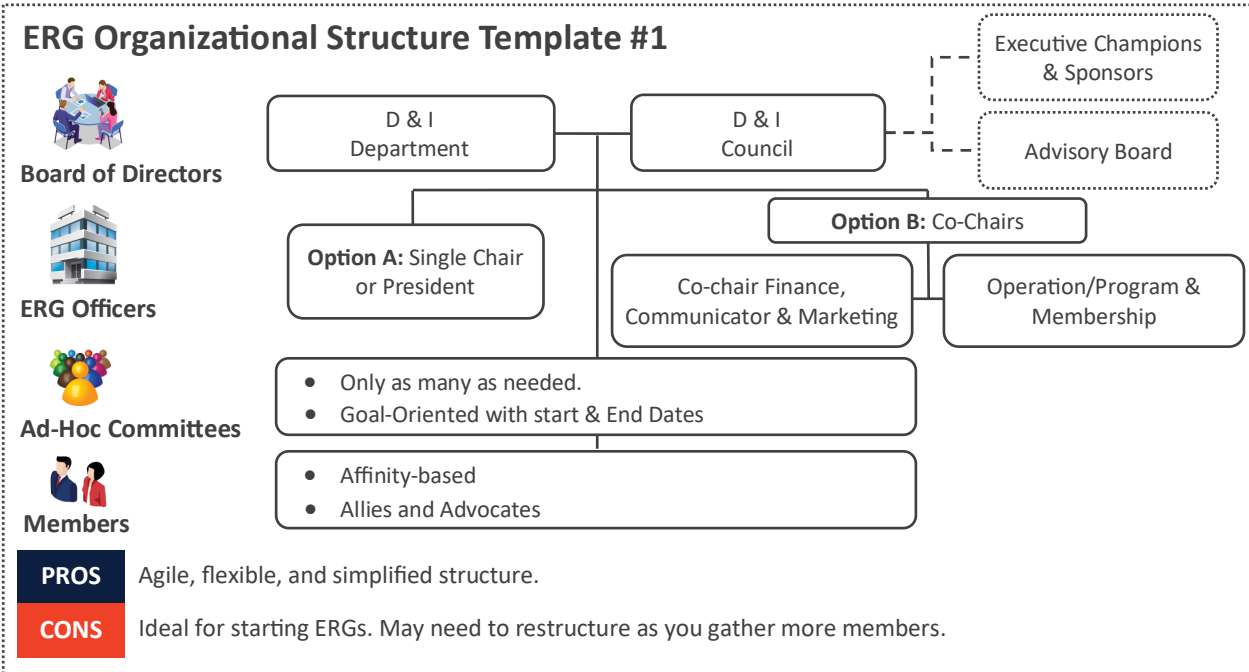
3 Structure

Structure includes the organizational roles and responsibilities of your ERG governance and reporting structure.
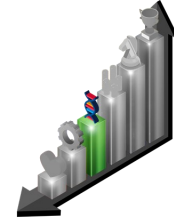
Three structures to consider

We have included three visual variations of organizational charts here.

ERG Organizational Structure Template #1

Board of Directors

ERG Officers

Ad-Hoc Committees

Members

- D & I Department
- D & I Council
- Executive Champions & Sponsors
- Advisory Board
- **Option A:** Single Chair or President
- **Option B:** Co-Chairs
- Co-chair Finance, Communicator & Marketing
- Operation/Program & Membership
- Only as many as needed.
- Goal-Oriented with start & End Dates
- Affinity-based
- Allies and Advocates

PROS	Agile, flexible, and simplified structure.
CONS	Ideal for starting ERGs. May need to restructure as you gather more members.

ERG Organizational Structure Template #2

Board of Directors

ERG Officers

Ad-Hoc Committees

Members

- D & I Department
- D & I Council
- Executive Champions & Sponsors
- Advisory Board
- Chair or President
- Operations and/or Program
- Finance
- Communicators, Marketing & Partnerships
- Membership
- Only as many as needed.
- Goal-Oriented with start & End Periods
- Affinity-based
- Allies and Advocates

Note: Ideally odd numbers for majority "tie-breaker"

PROS	Clear, detailed and nuanced roles.
CONS	Ideal for larger and growing ERGs as having multiple roles in a starting ERG may not be productive.

ERG Organizational Structure Template #3

Board of Directors

ERG Officers

Ad-Hoc Committees

Members

D & I Department	D & I Council

Executive Champions & Sponsors

Advisory Board

Chair or President	Secretary (Operations or Programs)	Treasurer (Finance)

Note: Ideally odd numbers for majority "tie-breaker" purposes.

- Only as many as needed.
- Goal-Oriented with start & End Periods

- Affinity-based
- Allies and Advocates

PROS Stable, coherent and defined roles.

CONS Ideal for small to medium sized ERGs. May need to have additional roles as you gather more members.

☐ **Ad-Hoc Committees:** Please note that we recommend forming committees on ad-hoc basis, rather than standing committees. This reduces organizational complexity and increases agility. Committees should ideally form based on a current need and a clear, achievable goal. Standing committees can create teams who may or may not be needed at a certain point in time and whose dedicated energy can flow toward a different, current need.
For these reasons, we recommend ad-hoc committees that assemble and disassemble upon clear achievements. Their dissolution means they provided the solution!

☐ **Bylaws:** These may not be necessary at first, when your ERG forms organically, but grows increasingly necessary as your ERG grows. Best to establish these prior to the formation of your ERG. Your group should ask for bylaws from an enterprise organizational representative authorized to approve these.

4 **Stakeholders**

Stakeholders will support your ERG as it forms, operates and grows. Which of these will be key to your success? You don't need them all at the start, so choose which are critical for now (members and a sponsor), and which to add later.

- ☐ **Members:** ERG members function as constituents and audiences that share in the ERG's mission and vision. They can serve actively to very occasionally, so are supporters and interested target audience members, rather than necessarily serve as frequent and consistent participants. They can be of that ERG's affinity, but can definitely contribute much as allies. Remember that member numbers are only one metric and ERG impact may or may not stem from large membership.
- ☐ **Executive Sponsors & Champions:** These consist of executives who hold decision-making capabilities and access to resources. They often do more than advise, as they can champion and even sponsor ERG activities. They also help align the ERG strategy with the enterprise strategy, so they should ideally represent senior levels who may even shape the enterprise strategy. These ERG Executive Sponsors and Champions serve to advise and coach to champion and sponsor.
- ☐ **Leadership Team:** These may eventually grow into your official ERG officers, but minimally could serve to form and launch your ERG.
- ☐ **Diversity & Inclusion Team:** This could consist of a dedicated D&I team, a D&I Advisory Council/Committee, Human Resources, Culture Advisory Councils/Committees, or any related team that would prove a good fit for advising and overseeing ERGs.
- ☐ **Officers:** These could derive from your leadership team or come from elsewhere.
- ☐ **Advisory Board:** Eventually, seasoned, former officers who stay involved with ERGs graduate to Advisory Board members. These are honoured leaders who advise as needed. They should only be called upon as needed and should neither hold decision-making authority or regular operating responsibilities. Treat these as your spast-officer gurus who can advise you with key knowledge and wisdom.
- ☐ **External Community Partners:** These can come from groups outside of your enterprise organization who align and support your ERG's mission and vision. They can come from customers, vendors, and competimates from across industries.
- ☐ **External Diversity & Inclusion Practitioner:** Network with leaders of other organization's similarly focused ERG's to share best practices, brainstorm when you hit obstacles, and provide support to each other. You can find them and connect through Elevate, AARP, LinkedIn and local HR organizations.

5 **Strategy**

A strategic plan defines how you will achieve your ERG's stated goal. Strategy evolves with current **"State"** (Step 2), so it is established after the ERG has formed. One major element of your strategy may be event planning.

Your strategy defines how you will achieve your intended impact and should result in measurable successes.

1 Write down the impact you want to have on your workforce, workplace and marketplace.

2 Write down activities that will help achieve that impact.

3 Write down some ideas on how to quantitatively measure the success of these activities.

What impact do we want to have?	What activities will help us achieve that impact?	How will we measure success?

Your strategy goals may include five dimensions that together ensure your ERG will drive bottom line value for your business. Here are best practices examples of tactics that support each strategy. What will ours be?

Strategy	Examples of Tactics to support this Strategy
Engagement	• Implements mentoring opportunities • Hosts innovation challenges
Development	• Co-host town halls and forums to educate members • Partners on career and leadership development workshops
Community	• Contributes in STEM education & community outreach • Participate and leads community service initiatives on behalf of the company
Recruitment	• Refers top talent through external networks to meet hiring needs • Supports career fairs, diversity conferences and critical skills hiring events
Recognition	• Empowers membership as brand ambassadors at their alma maters • Participates in focus group research

6 Success Measures

How will you measure success? It can entail qualitative and quantitative measures but remember it's more than numbers and could consist of success stories.

Discuss and answer these questions in three areas that are core to the success of your business:

- **People:**
  - How is the group helping the business improve recruitment, retention, promotion and engagement of employees who identify with this group?
  - How is the group helping the business improve community relationship?
- **Productivity:**
  - How is the group enhancing professional skills of the members and/or company at large?
  - How is the group helping the company understand and address changes to policies, culture and benefits that will increase employee productivity?
- **Profitability:**
  - How is the group helping the company identify and develop products and services to attract customers who identify with this group?
  - How is the group identifying ways in which the company is doing something that customers who identify with this group may find inappropriate or offensive?

Success measures can be simple, such as:
- Tracking the number of participants or attendees at the ERG events.
- Tracking the number of ERG members involved in a mentoring program.
- Tracking employment referrals given by ERG members.

Or, can be more complex, such as:
- Comparing employee engagement and retention of ERG members to other employees.
- Measuring promotion rates or movement of ERG members into high-potential pools within the organization.
- Tracking contributions to the bottom line by calculating return on ERG funding.

However, the ability to measure ERG success also can be impacted if:
- The ERG does not communicate outcomes of measurement consistently and/or to the appropriate audience
- The company (as a policy) doesn't collect data on certain measures (i.e. number of LGBT employees)
- The ERG doesn't consistently track progress towards some or all metrics/indicators and/or is unsure which metrics or indicators are important to the company

Diversity Best Practices. (2011, October). *Measuring Success of Employee Resource Groups*

Sample Questionnaire to Assess ERG Success Metrics

1. **What are the reasons you are a part of your ERG?**	Check all that apply. ○ Professional development ○ Career advancement ○ Community service ○ Cultural exploration ○ Networking with executives and colleagues ○ Other _____
2. **What percentage of your ERG's membership attends your events?**	1 – 0% to 20% | 2 – 20% to 40% | 3 – 40% to 60% | 4 – 60% to 80% | 5 – 90% ○——○——○——○——○ 1 2 3 4 5 Identify factors that affect your current rating. _____ _____
3. **What is the engagement challenge level that your ERG faces?**	1 – low | 3 – medium | 5 – high ○——○——○——○——○ 1 2 3 4 5 Identify factors that affect your current rating. _____ _____
4. **What is the current opportunity level of your ERG?** (e.g. ERG is engaged with program proposals, promotions, innovation, etc.)	1 – few opportunities | 3 – enough opportunities | 5 – many opportunities ○——○——○——○——○ 1 2 3 4 5 Identify factors that affect your current rating. _____ _____
5. **How well does your ERG positively impact the business bottom line?**	1 – not impacting | 3 – moderately impacting | 5 – highly impacting ○——○——○——○——○ 1 2 3 4 5 Identify factors that affect your current rating. _____ _____

For more information about the tool, inquire with Spectrum Knowledge.

Unit IV

Planning for a
Successful First Year

GOAL:

To provide tools that can support planning for a successful first year of the new Caregiving ERG effort, including: focus, alignment with organizational goals, and scoping for sustainability and impact.

Design a First Year to Show Clear, Measurable Success

You've got momentum for your organization to consider starting a Caregiving ERG effort. Congratulations! What should be your kick-off effort, and how do you build momentum in your first year?

Here are some tools and best practices so you can start off strong, focused, and sustainably successful. Consider it wisdom passed down from other ERG leaders who've been there. Think about the long-term now, and pace yourselves!

1. Be brutally focused

- Choose one specific goal for this year, so you know what you want members to learn and how this will add value for your organization this year. Align your ERG goal with the culture and mission of your organization, and know how you'll measure if you are successful in reaching your goal. 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).
- Then use it as a firm criteria for what initiatives and events you plan, so you don't end up with a mishmash. Make sure everything you choose to do this year builds towards your consistent goal.
- Using what you filled out in the Strategy worksheet from page 41, choose ONE key impact for your ERG initiative to have in the first 12 months. Make sure your team is aligned on it, so you all stay focused on this specific impact. Make sure you have a SMART goal attached to it. (Specific, Measurable, Achievable, Relevant, Time-bound)

2. Build on the base you've got

- Find the organic support network that is already happening among your working caregivers, and scale it up into an internal messaging channel or Caregiver page on your employee portal. Look in it to find people who can help lead ERG Caregiving events, or be a speaker. Build on the strength and momentum you already see around caregivers and caregiving.

3. Be assertively inclusive

- Harvard Business Review recommends that you "be assertively inclusive".
  Working parents [and caregivers] come in all packages. There are male, female, biological, adoptive, gay, straight, from every conceivable background, and from all parts and levels of the organization. And as a network lead, it's your job to make sure that every single one of those parents gets the message, loud and clear, that "You are welcome here. This if for you."

  Start by ensuring the 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 working parent at [organization name]."

  And don't be afraid to get personal: walk down the hall and invite that single, adoptive dad of a 16-year old to join you at the group's next meeting. Remember: The broader and deeper your network is, the stronger it will be."
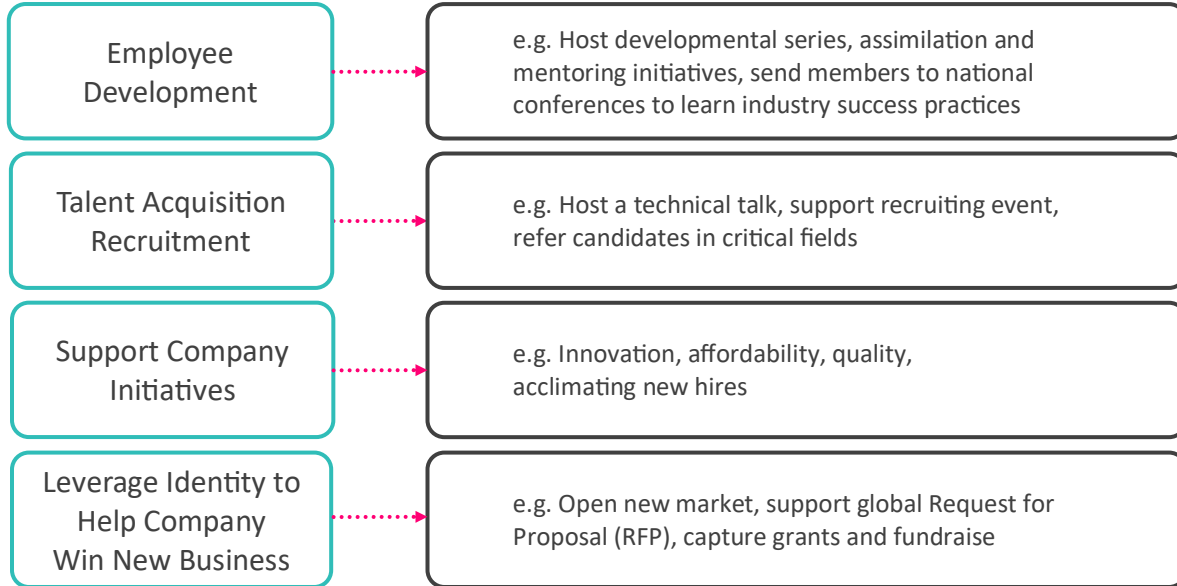
- Make sure you choose a blend of efforts, events and initiatives that will bring a wide range of people from across your organization into the conversation, especially those who work virtually, in global offices, and in other non-headquarters locations. Caregivers are quick to bond with each other, and this can help you achieve your broader goals for creating your organizational culture goals and building cross-office relationships.

- Of course, keep all events timed so working caregivers can participate. And keep them short! Caregivers don't have much time to spare, so make every minute count. A thirty-minute blitz event online or at lunch might be your secret weapon.

4. Be agenda-driven and solutions oriented

- Have a clear agenda for every conversation or event, with clearly defined positive actions and/or solutions for people to use right afterwards 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.

- Communicate your agenda clearly in all of your planning communications so that time-strapped caregivers will be able to assess whether it's valuable enough to them to carve time out of their day to attend.

- Take care not to let the conversation focus on how hard life is as a working caregiver, without any positive action coming from it. Like every other ERG, this is not a group venting session. It's a way to build solutions, advocate for what this employee group needs to advance in your workplace, and measurably contribute to the overall success of your organization's core value.

Dowling, D. W. (2018, November 12). *How to Launch a Working Parents' Support Group in Your Organization.* Harvard Business Review

5. Stick to a reasonable scope

- Focus on the types of ERG activities that executives see as most valuable, especially in Year One as you are building buy-in and advocacy among senior leaders and your Executive Sponsor.

Employee Development	e.g. Host developmental series, assimilation and mentoring initiatives, send members to national conferences to learn industry success practices
Talent Acquisition Recruitment	e.g. Host a technical talk, support recruiting event, refer candidates in critical fields
Support Company Initiatives	e.g. Innovation, affordability, quality, acclimating new hires
Leverage Identity to Help Company Win New Business	e.g. Open new market, support global Request for Proposal (RFP), capture grants and fundraise

- Stick with the optimized range of 8 or fewer events per year. Resist the urge to plan monthly events! Only plan as many events as you can make wildly successful with strong content, and strong attendance. Leave people wanting more.

	TYPICAL	EXPECTED	OPTIMIZED
# of ERG events	More than 12	9-11	Fewer than 8
Value	• Low perceived value and quality per event, too many events • Management of ERG leaders: Deny time for ERG leader involvement and view ERG participation as distraction from workforce performance	• Medium perceived value and quality per event • Management of ERG leaders: Neutral on ERG leader involvement and see participation as time-consuming, but necessary to improve workplace culture	• High perceived value and quality per event, less quantity is a plus • Management of ERG leaders: Support ERG leader involvement and view as positive for workforce
Utilization	• ERG leaders and members: Feel overworked due to aggressive event schedule, employees do not step up to leadership positions because they negatively equate ERG time requirements with their careers • Executives: Disengaged because they are requested too often	• ERG leaders and members: Feel accomplished by hard work, employees question whether stepping up into a leadership role is worth the required hours • Executives: Selective on events they support	• ERG leaders and members: Feel satisfied and employees step up to lead in following years • Executives: Appreciate that ERGs maximize their participation

6. Select your executive sponsor strategically and create value for them

- Create an ERG Leadership Agreement that everyone agree to now to avoid frustration and miscommunication later. Work with your ERG development team and HR to 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 know what they are agreeing to do, and for how long.

Purpose	Employee Resource Groups (ERGs) are networks of and for employees structured around non-majority dimensions of diversity. ERGs connect employees, further the organization's mission and provide many other benefits for members of the group, as well as the organization, by: • Providing professional growth opportunities • Increasing awareness and promotion of diversity and inclusion • Assisting in achieving organizational goals • Supporting members to sustain the vision • Strengthening and renewing relationships through improved communication between the organization and its customers
ERG Leader's Expectations and Commitments	• Support the attendance of at least 80% of ERG Leadership meetings • Promote a culture that encourages personal development and growth in a respectful and inclusive environment • Discuss diversity and inclusion topics that will improve the quality of services in the organization • Create an environment that is representative of the communities that the organization serves • Engage communication between the ERGs and the greater organization
ERG Leader's Supervisor Expectations and Commitments	• Support employee participation as an ERG business operating division • Support their employees' attendance at all scheduled ERG Leadership meetings • Support ERG event planning and event preparation
ERG Executive Sponsor's Expectations and Commitments	• Attend 80% of ERG Leadership meetings • Provide direction to the ERG in developing strategic alignment with organizational strategies and goals • Promote a culture that encourages personal development and growth in a respectful and inclusive environment • Create an environment that is representative of the communities that the organization serves • Engage communication between the ERGs and the greater organization • Attend ERG events to provide visibility and support
Signatures and Acknowledgements	Name: _____ Phone Number: _____ ERG Role: _____ ERG Name: _____ Signature: _____ Date: _____ By signing this document, you acknowledge, understand and accept the expectations and commitments as outlined above.

Write your own **ERG Leadership Agreement**

Purpose	
ERG Leader's Expectations and Commitments	
ERG Leader's Supervisor Expectations and Commitments	
ERG Executive Sponsor's Expectations and Commitments	
Signatures and Acknowledgements	Name: _____ Phone Number: _____ ERG Role: _____ ERG Name: _____ Signature: _____ Date: _____ By signing this document, you acknowledge, understand and accept the expectations and commitments as outlined above.

Select your executive sponsor strategically and create value for them

- Debate, develop and consider specific criteria for your sponsors,
  assess candidates and select a sponsor strategically using the Suite Spot Tool below.

1. Identify candidates

Start by working up an initial list of potential candidates.
Go for quantity in this step. The more names, the better.

2. Assess candidates

Assess each candidate along the five dimensions below.

☐ **Coach**
  Skilled at challenging the ERG Leaders to develop better versions of themselves and to get past obstacles

☐ **Mentor**
  Skilled in effective navigation of the organization and culture and getting things done

☐ **Group-Builder**
  Successful in building strong teams and attractive communities

☐ **Inner Circle**
  Respected member of the business leadership team

☐ **Rainmaker**
  Successful in achieving profitable results
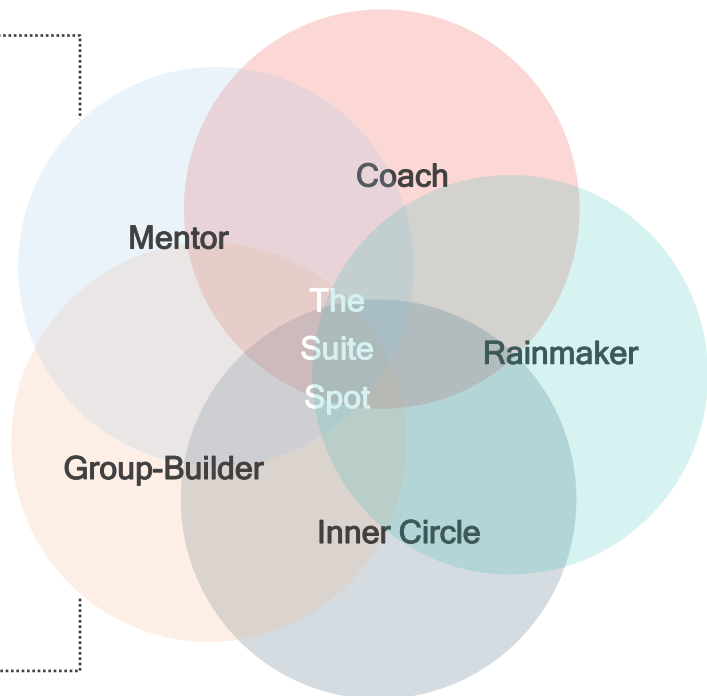
Using the space provided on the diagram, choose 6 from your identified candidates.
On a subjective scale of 1-10 (with 1 being the lowest and 10 the highest),
rate your candidate according to the five dimensions.

NAME:

RATING:

_____ ☐ Coach
_____ ☐ Mentor
_____ ☐ Group-Builder
_____ ☐ Inner Circle
_____ ☐ Rainmaker

NAME:

RATING:

_____ ☐ Coach
_____ ☐ Mentor
_____ ☐ Group-Builder
_____ ☐ Inner Circle
_____ ☐ Rainmaker

NAME:

RATING:

_____ ☐ Coach
_____ ☐ Mentor
_____ ☐ Group-Builder
_____ ☐ Inner Circle
_____ ☐ Rainmaker

NAME:

RATING:

_____ ☐ Coach
_____ ☐ Mentor
_____ ☐ Group-Builder
_____ ☐ Inner Circle
_____ ☐ Rainmaker

NAME:

RATING:

_____ ☐ Coach
_____ ☐ Mentor
_____ ☐ Group-Builder
_____ ☐ Inner Circle
_____ ☐ Rainmaker

NAME:

RATING:

_____ ☐ Coach
_____ ☐ Mentor
_____ ☐ Group-Builder
_____ ☐ Inner Circle
_____ ☐ Rainmaker

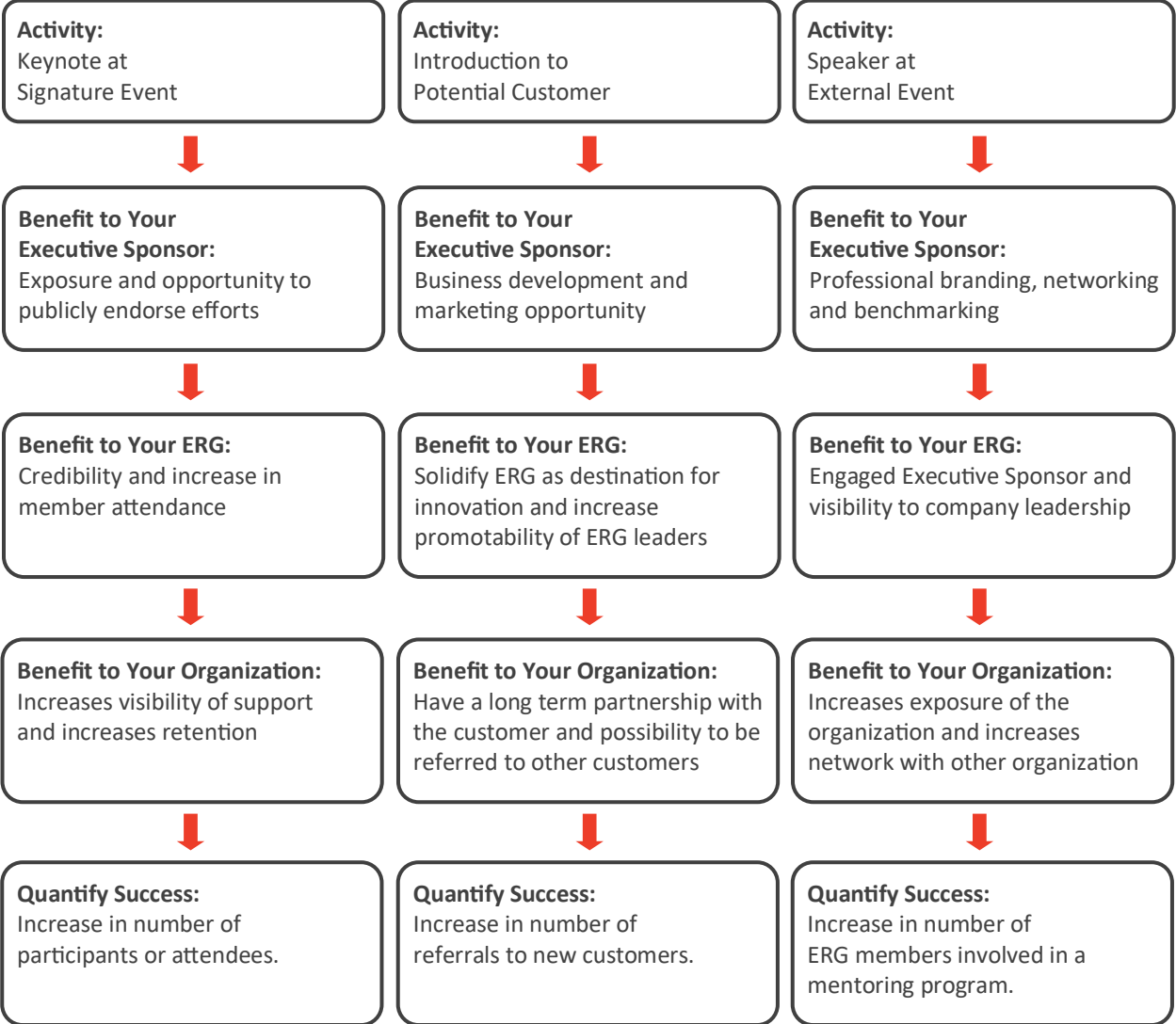## 3. Meet candidates, select and confirm your sponsor

Meet with the people in your "**Suite Spot**" list and thoroughly explain your intent of choosing them as one of your Executive Sponsor Candidates.
You should be able to determine your executive sponsor after talking to each people in your **"Suite Spot"** list. Your Suite Spot is the convergence of the right executive sponsor skills that your ERG needs.

Engage your executive sponsor strategically

- Be strategic about how to engage your Executive Sponsor so that you use their time and social capital in the organization to create maximum value for your Caregiving ERG effort—and for your sponsor. Use the Sponsor Alignment Matrix to craft how to best engage your sponsor. The steps are:

1. **Define the Activities** where you will ask your sponsor for their time and effort
2. **Define the Sponsor Benefit** of each activity
3. **Define the ERG Benefit** of each activity
4. **Define the Organization Benefit** of each activity
5. **Define Success** and how you will measure it

Here's an example:

Activity: Keynote at Signature Event	**Activity:** Introduction to Potential Customer	**Activity:** Speaker at External Event
Benefit to Your Executive Sponsor: Exposure and opportunity to publicly endorse efforts	**Benefit to Your Executive Sponsor:** Business development and marketing opportunity	**Benefit to Your Executive Sponsor:** Professional branding, networking and benchmarking
Benefit to Your ERG: Credibility and increase in member attendance	**Benefit to Your ERG:** Solidify ERG as destination for innovation and increase promotability of ERG leaders	**Benefit to Your ERG:** Engaged Executive Sponsor and visibility to company leadership
Benefit to Your Organization: Increases visibility of support and increases retention	**Benefit to Your Organization:** Have a long term partnership with the customer and possibility to be referred to other customers	**Benefit to Your Organization:** Increases exposure of the organization and increases network with other organization
Quantify Success: Increase in number of participants or attendees.	**Quantify Success:** Increase in number of referrals to new customers.	**Quantify Success:** Increase in number of ERG members involved in a mentoring program.

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

Activity:	Activity:	Activity:
↓	↓	↓
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 Organization:	**Benefit to Your Organization:**	**Benefit to Your Organization:**
↓	↓	↓
Quantify Success:	**Quantify Success:**	**Quantify Success:**

Unit V

Ideas That Work
—a Head Start on Brainstorming Your Caregiving ERG Activities

GOAL:
To provide ideas to get you started with your ERG activities—and resources to make it easy for you.

Initiatives 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 core focus for Year One as a make-or-break criteria 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.

Here are some ideas that work, and are primed to advance your organization's overall goals. Print or project this list to share with your ERG planning team, ask each person to read then choose their "top 3", share out and then choose what's the best fit for your organization!

1. Host Lunch and Learns

- Offer a lunch and learn series on a range of caregiving issues. A 30-minute Brown Bag Lunch may be a winning format for caregivers who have packed days and tight commutes. Offer an option to videoconference in to the in-person gathering, too.

- Request a caregiving expert from AARP to join your meeting via video conference, or ask about our Lunch and Learn resources by emailing caregiving@aarp.org.

- Ask your organization's internal experts and service providers to bring topics. For example, ask your 401k provider to host a session on budgeting for caregivers, your health insurance provide to present on self-care for caregivers, or your law firm to present on wills and healthcare directives.

- Invite a professional coach in to provide tips and tools on how caregivers can create customized professional development plans, or a local mindfulness expert to present practical tips for integrating mindfulness into a workday.

2. Power breakfast conversation starter: how dual career couples thrive at work and home

- Bring together current and future parents and caregivers for a session to share best practices for how to navigate a dual career family so both partners can thrive, using resources from www.workableconcept.com.

- Consider making it a videoconference that employees can invite their partners to attend, too. (Think of it as a modern version of the Corporate Family Picnic.)

3. Happy hour conversation starter: lifting barriers for men to take family leave

- Use this report from New America as a conversation starter about what affects men's decisions about whether to use the paid leave they are eligible for and how to encourage them to use it.

- If appropriate, engage your HR team to have follow-up 1:1 conversations with men who were eligible for leave in the past 12 months but did not use it all. (The Happy Hour will get ideas flowing, but employees may be more willing to share their own full stories privately, and through HR rather than their own managers.)

4. Create a signature event

- Create an event that can become an annual event for your Caregiving ERG effort. You can build it around National Caregivers Day (February), Equal Pay Day (April), Mothers and Fathers Days (May-Jun), or National Caregivers Month (November).
Use it to highlight the range of caregiving that is part of the lives of employees of all identities, roles, genders, and levels in your organization. Drive participants to one meaningful action, like completing a brief online training on how to effectively manage caregivers
(available for free at www.aarp.org/employercaregiving)

- 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 in-person event. Or create one core piece of content that you can stream to multiple locations, then host a social conversation at each location immediately after the shared virtual experience.

5. Sponsor manager training for managers of caregivers

- Did you know that over **60%** of working caregivers say their direct supervisor has a negative impact on work-life balance?
Use **AARP's 20 minute free online training for Managers of Caregivers** (available at https://www.aarp.org/employercaregiving) 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 to make this happen.

6. Work with your internal communications team to share stories of caregiving by your organization's senior leaders

- Nothing sends a stronger cultural message to your employees than the stories their senior leaders share about their own experiences caring for their families and loved ones, especially when they used family leave or navigated a challenging moment in their professional life.
Transparency builds trust. Here's an easy template to use: iheartcaregivers.org

7. Host a "How to use my benefits" workshop for employees with caregiving responsibilities

- Partner with your HR and benefits broker for a "guided tour" of how all of your different benefits and workplace policies can be maximized by those caring for their families. Create and distribute a Benefits Tip sheet for Caregivers as an easy resource for your whole company, using the template at www.aarp.org/employeecaregiving

8. Do a gap analysis of best practices to create a caregiver-friendly workplace

- Use the self-assessment tool available from AARP and NEGBH's toolkit for employers https://nebgh.org/initiative/caregiving/ or work with a consultant like Workable Concept to facilitate this self-assessment.

9. Review your organization's paid leave and/or flexibility policies to help employee retention

- Use the Resources for Employers from PL+US to review your organization's paid leave policies and discuss who does/doesn't have access to leave, and who does/doesn't use their full available leave. Find them here: https://paidleave.us/resources. You can do this with your Caregiving ERG members, or as an initiative with leaders from other ERGs across affinity groups. Be sure to include your HR team in the conversations.

- Read and discuss articles on paid leave dynamics, including "Maria Shriver Shares Advice On Managing Caregivers at Work" and "How Managers Can Be Fair About Flexibility for Parents and Non-Parents Alike". Discuss how this also plays out for working family caregivers then brainstorm a small scale experiment for a team in your organization to try over the next 6 months to improve caregivers' access to family leave and flexible work.

10. Review your organization's recruiting website and job postings to improve employee recruiting

- How organizations treat their caregivers is a bellwether for how they treat staff overall. Use this article from Entrepreneur to start an effort to review your organization's recruiting messaging to see how it can better signal that yours is an organization where working caregivers are valued. https://www.entrepreneur.com/article/323595

- Sit down with your HR/recruiting team to see if family-supportive policies and benefits are featured in your Careers webpage and job postings. Look for imagery that is representative of a wide range of caregivers 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 who are or know they will be caregivers. Use your ERG membership to help shape messages that feel authentic to your workplace.

11. Create an employee survey to gather annualized data about caregiving

- In many organizations, data-driven decisions are key. Make sure you have data in hand about how many employees are caregivers, anticipate that they will care for a child and/or adult in the next three years, and provide input about their employee experience on key topics that are key to retaining working parents and caregivers—managerial support, use of flexible scheduling, use of telecommuting, and a sense of belonging.

  AARP has tools to get your started (employercaregivingtoolkit.org), and shares important considerations around caregivers' concerns about self-identifying in the organizations.

Kashyap, V. (2019, March 5). *Work-Life Balance Is Dead! (Working Parents Need Help Navigating The Workplace).* ProofHub
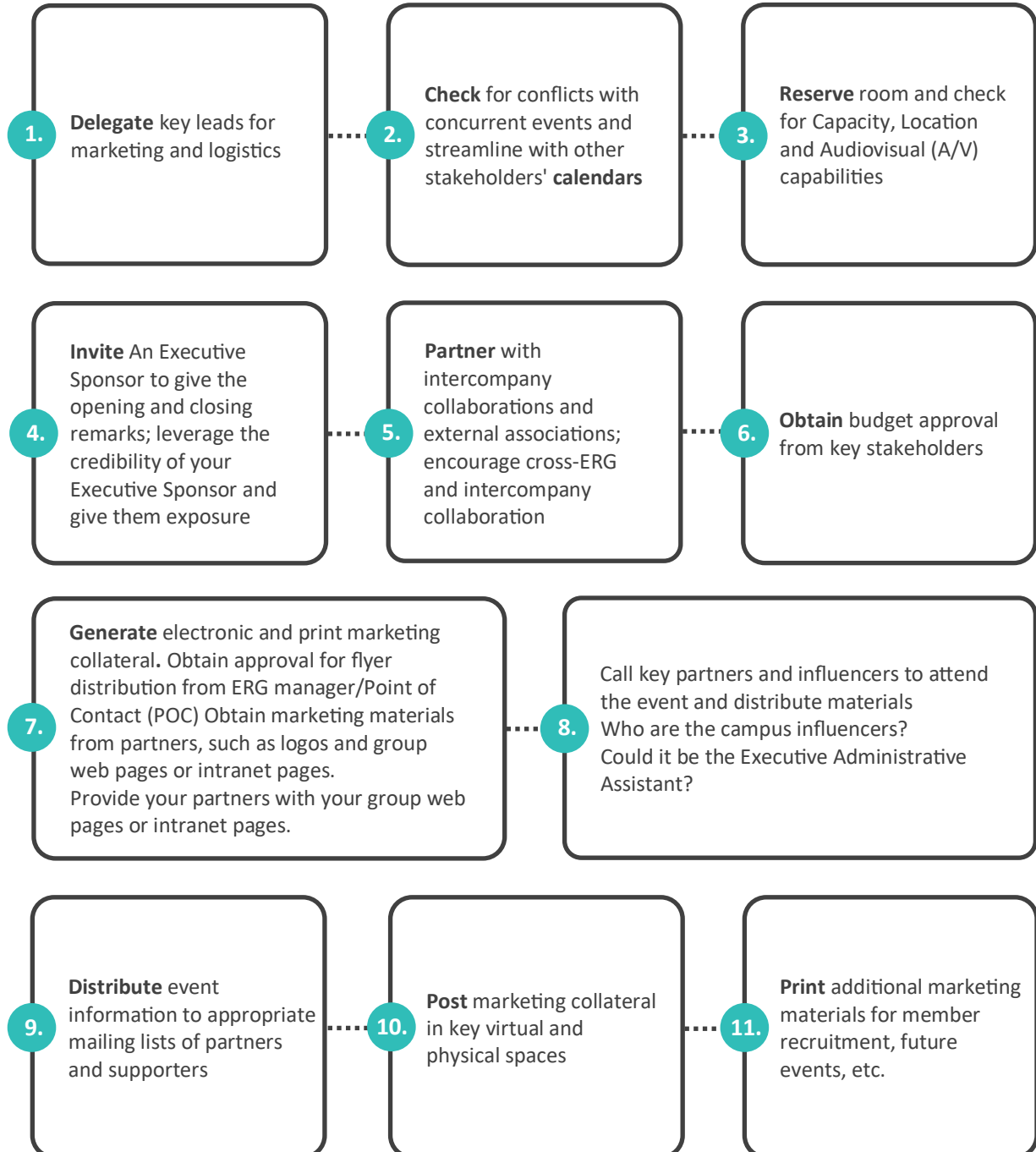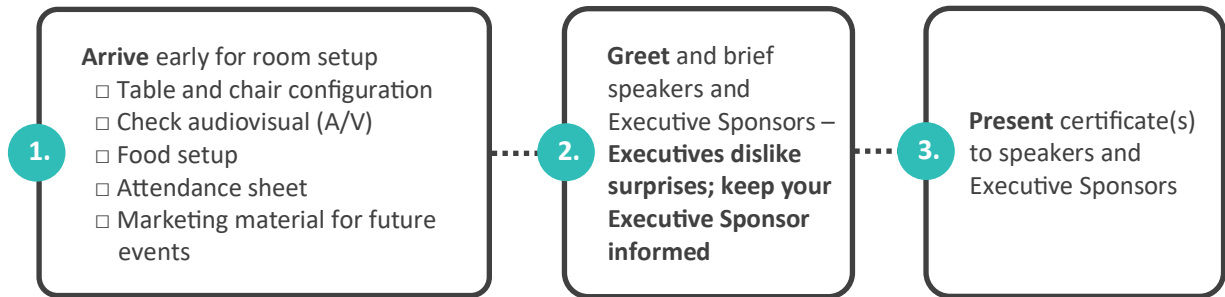
Plan a Successful Event

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?

☐ Before the event:

1. **Delegate** key leads for marketing and logistics

2. **Check** for conflicts with concurrent events and streamline with other stakeholders' **calendars**

3. **Reserve** room and check for Capacity, Location and Audiovisual (A/V) capabilities

4. **Invite** An Executive Sponsor to give the opening and closing remarks; leverage the credibility of your Executive Sponsor and give them exposure

5. **Partner** with intercompany collaborations and external associations; encourage cross-ERG and intercompany collaboration

6. **Obtain** budget approval from key stakeholders

7. **Generate** electronic and print marketing collateral**.** Obtain approval for flyer distribution from ERG manager/Point of Contact (POC) Obtain marketing materials from partners, such as logos and group web pages or intranet pages.
Provide your partners with your group web pages or intranet pages.

8. Call key partners and influencers to attend the event and distribute materials
Who are the campus influencers?
Could it be the Executive Administrative Assistant?

9. **Distribute** event information to appropriate mailing lists of partners and supporters

10. **Post** marketing collateral in key virtual and physical spaces

11. **Print** additional marketing materials for member recruitment, future events, etc.

During the event:

1. **Arrive** early for room setup
- ☐ Table and chair configuration
- ☐ Check audiovisual (A/V)
- ☐ Food setup
- ☐ Attendance sheet
- ☐ Marketing material for future events

2. **Greet** and brief speakers and Executive Sponsors – **Executives dislike surprises; keep your Executive Sponsor informed**

3. **Present** certificate(s) to speakers and Executive Sponsors

After the event:

1. **Ensure** the facility is clean prior to leaving

2. **Retain** event logistics, marketing materials and speaker information

3. **Send** hand-prepared thank you notes to speakers and Executive Sponsors

4. **Email** thank you notes to volunteers and participants – **Often forgotten, thank you notes will elevate your ERG's brand. Craft** individual thank you emails to the direct manager of the event lead(s), CC the lead and senior manager and/or director.

5. **Retain** marketing materials and speaker presentations to share with Executive Sponsors, managers and future officers: documentation is critical to success

6. **Distribute** member marketing materials as a recruitment tool

7. **Walk** through the event and refine process

8. **Document** best practices and lessons learned

Unit VI

Build for Sustainability Using the
ERG Leadership Model

GOAL:

To introduce Spectrum Knowledge's tools to help you create a suistainable approach – so your Caregiving ERG initiatives is successful even while led by caregivers with limited time and high–performance expectations.

Prepare Yourself for Long-Term Success

As you create your Caregiving ERG effort, start early to keep an eye on how to ensure it's 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 start to address some of the challenges that may arise. For the full version of each tool, inquire with Spectrum Knowledge.

1. The Growth Mindset

- Growth mindset is when you believe you can improve with effort and practice, rather than being "good at" or "bad at" something. Growth mindsets encourage others to grow.

- Research shows that people with growth mindsets are more likely to learn goals (bettering your skills) than people with fixed mindsets who are more likely to set performance goals (moving a metric or hitting a KPI).

- Employees in a growth mindset organization are:

  47% likelier to see their colleagues as trustworthy;

  34% likelier to feel a strong sense of ownership and commitment to the company;

  65% likelier to say that the company supports risk-taking; and

  49% likelier to say that the company fosters innovation.
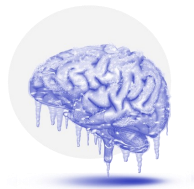
FIXED MINDSET	CHALLENGES	GROWTH MINDSET
Adversity	Mistakes	Opportunity
Approval	Priorities	Knowledge
End Result	Focus	Process

Henderson, V. L., & Dweck, C. S. (1990). *Motivation and achievement.* In S. S. Feldman & G. R. Elliott (Eds.), At the threshold: The developing adolescent (p. 308–329). Harvard University Press.

Dweck, C. (2006). *Mindset: The New Psychology of Success.* Random House

Now look for how to use a growth mindset in your ERG leadership work:

1. **ASK FOR HONEST FEEDBACK.** Feedback will make you better. Understanding the positive and negative perceptions 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 and this fosters 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 from. 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.

Instructions:

1. Identify 1 example of an action or behaviour that exhibits **Fixed Mindset** for each category in the left column.

2. Identify 1 example of an action or behaviour that exhibits **Growth Mindset** for each category in the right column.

Here's a sample response:

FIXED MINDSET	CHALLENGES	GROWTH MINDSET
I take negative feedback of my work personally	Criticism	I utilize negative feedback as areas for improvement

Put It in Action

FIXED MINDSET	CHALLENGES	GROWTH MINDSET
	Intelligence	
	Obstacles	
	Criticism	
	Effort	
	Other's Success	
	Mistakes	

Discussion Questions

1. Why is it important to be more proactive in getting feedback on how to develop a growth mindset?

2. In your current position and circumstances, how can you promote a growth mindset in your workplace and how can this help you in return?

3. How can you apply a growth mindset to your caregiving activities?
What can you learn from caregiving?

4. How would you better structure solutions if there are several ways of looking at a learning experience?

5. What are the related values or qualities of a growth-oriented mindset and how can you nurture them?

2. The Empathy Map

Empathy is the ability to understand and share the feelings of another person. Empathy is a muscle that **can be strengthened** either by individuals, by teams or by a whole organization.

6% increase in average earnings among the top 10 companies while
9% decrease among the bottom 10 of the Global Empathy Index 2015.

91% of CEOs believe empathy is directly linked to a company's financial performance,
92% of CEOs say their organization is empathetic, but only
72% of employees agree.

⭐ **GOAL** ⭐

Who are we empathizing with?
Who is this person we want to understand?

What do they need to DO?
What job(s) do they want or Need to get done?

WHO

DO

What do they HEAR?
What are they hearing others say?

HEAR

What do they THINK and FEEL?

⚡ PAIN   📈 GAIN

SEE

What do they SEE?
What do they see others saying and doing?

What do they DO?
What can we imagine them doing?

DO

SAY

What do they SAY?
What can we imagine them saying?

Parmar, B. (2015, January). Corporate Empathy Is Not an Oxymoron. *Harvard Business Review*
Business Solver (2019, March 27). *2019 State of Workplace Empathy Study.*

Now look for how to use the Empathy Map in your ERG leadership work:

1. **LISTEN BEFORE ACTING.** Allow space for others to express their side, withholding your judgment, to give more room for valuable compromise, effective negotiation, and better relationships.
2. **EXERCISE YOUR CREATIVITY.** Stepping into someone else's situation or experience is easier said than done. Let go of your biases and be creative in your attempt to understand.
3. **EXPLORE AND CONNECT.** When trying to understand someone, especially that person we are not fond of, try to explore common grounds and find connections there.
4. **REFLECT.** As you try to understand others, think also of what you have understood about yourself. You can gain valuable self-discovery by empathizing with others.
5. **WITHHOLD JUDGMENT.** Re-adjust your attention outside of yourself. Sometimes when we try to listen, we can't help but judge and determine other's experiences from our own set of experiences. Withhold your judgment and be more objective.
6. **OPEN UP.** "Connection" is a two-way process. Do not hesitate to show your vulnerability and you will be surprised at how many things you share in common with others.
7. **PRACTICE.** Like any other quality, empathy is something that develops and evolves. No one woke up and is suddenly became empathetic. It is also not a case of "you are born with it or not." Be more conscious of putting the effort to practice empathy every day.
8. **BE GENUINE.** Like any other effort to connect with someone, becoming empathetic boils down to genuineness. Try to avoid canned answers that will make you sound falsely empathetic. It's okay if you have nothing to say about the subject. Listening is more than enough.

Instructions:

1. Identify a situation in the workplace that you, as a **Caregiving ERG leader**, would like to resolve or address.

2. Answer the questions in the Empathy Map to address the problem or situation.

3. Reflect on your Empathy Map before creating action steps to achieve your goal.
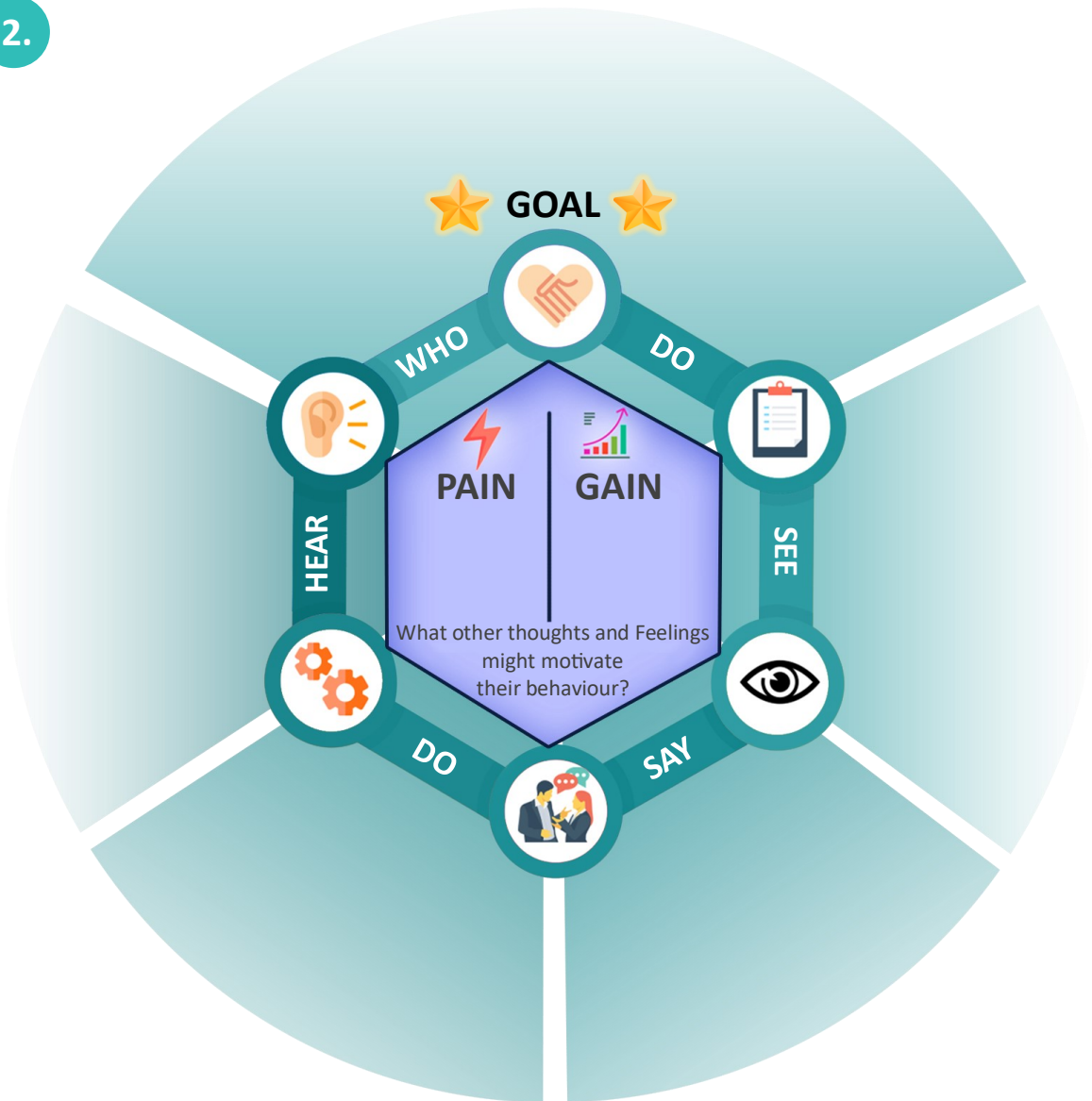
Put It in Action

1.
Situation:

2.

GOAL

WHO

DO

HEAR

SEE

PAIN | GAIN

What other thoughts and Feelings might motivate their behaviour?

DO

SAY

Discussion Questions

1. What are the simple ways you can bring to your workplace to encourage a more empathetic working environment?

2. Do you think there is a time that being empathetic may not work? What could these times may be and why?

3. Has there been a time when you found it hard to empathize with someone? What do you do?

4. What changes will you make in your interactions with your colleagues after reviewing the empathy map?

3. Capacity Cells

Capacity Cells are a tool to optimize productivity by managing your energy. Research shows that employees who learn strategies to prevent low-capacity moments in their workday improve their relationships with customers and clients, show performance and productivity improvement, and outperform employees who are not trained on these strategies.

71% of participants who received energy-management skills training displayed positive performance and productivity improvement.

PHYSICAL	Energy related to the body's functions and overall vitality; health
MENTAL	Energy related to cognitive functions and processes
EMOTIONAL	Energy related to the internal states of being that influence thought and behavior
SPIRITUAL	Energy related to the nonphysical part of a person where emotions and character meet; a person's sense of purpose or fulfillment

Schwartz, T. & McCarthy, C. (2007, October). Manage Your Energy, Not Your Time. *Harvard Business Review*

Now look for how to use the Capacity Cells in your ERG leadership work:

1. **STRIKE THE RIGHT BALANCE.** Be more sensitive to your needs especially in areas of life to where you rarely pay attention. To live life to the fullest, focus on more than one or two energy areas by tending to all four.
2. **VOCALIZE YOUR NEEDS.** We often keep failures to ourselves. Reach out to someone you trust and express your needs especially when you have reached your limits, made mistakes, or even failed. The answer doesn't necessarily have to manifest right there and then. Acknowledging these needs is a good first step.
3. **TAKE IT ONE STEP AT A TIME.** The road to change takes one step at a time and view this as a lifelong journey, rather than a short-term need or goal. Focus on one task at a time and take that step—which also focuses your energy needs. Just be consistent in making the effort of maintaining your pace.
4. **DEVELOP CONSISTENCY.** Effectively managing your energy resources and being able to allocate them wisely should come as second nature. This second-nature habit takes consistency and frequent practice.
5. **TAKE BREAKS WHEN NEEDED.** Your brain needs to rest from time to time as you expend energy during waking hours. Having a power nap can boost energy and productivity. Spending time outside your workspace, by taking a walk outdoors, for example, can help tremendously replenish your capacities.
6. **IDENTIFY YOUR MOST PRODUCTIVE HOURS.** We always have that time of day where we are most productive. Tackle the most demanding tasks during these periods to get the best value of your time. Some are early birds and others are night owls. Determine your optimum aviary state.
7. **DO NOT LET DOWN TIMES AFFECT RELATIONSHIPS.** When your energy is depleted you are easily frustrated and short-tempered and this can have negative effects on relationships. You can avoid this if you manage your energy more effectively.
8. **SCHEDULE YOUR ENERGY.** Scheduling daily energizing activities will allow you to sustain a more positive mindset throughout the day. Place certain activities on your schedule, from exercise and alone time to family and errand time.
9. **EMBRACE THE EXPERIENCE.** No one will do it right the first time, so don't let re-structuring old patterns, habits, and behaviours defeat you toward experiencing a more meaningful life. Enjoy the journey and find joy with these new challenges. With resilience and the right perspective, you'll achieve that balance in life everyone strives for.

Put It in Action

PHYSICAL   My Score: _____

____ I don't regularly get at least seven to eight hours of sleep; I often wake up feeling tired.

____ I frequently skip breakfast, or I settle for something that isn't nutritious.

____ I don't work out enough (cardiovascular training at least three times a week and strength training at least once a week).

____ I don't take regular breaks during the day to truly renew and recharge.

____ I often eat lunch at my desk, if I eat it at all.

MENTAL   My Score: _____

____ I have difficulty focusing on one thing at a time, or I am easily distracted during the workday, especially by email.

____ I spend much of my day reacting to immediate crises and demands.

____ I don't take enough time for reflection, strategizing, and creative thinking.

____ I work in the evenings or on weekends.

____ I almost never take a vacation, or when I do, I often access my work email.

EMOTIONAL   My Score: _____

____ I frequently find myself feeling irritable, impatient, or anxious at work.

____ I don't have enough time with my family and loved ones.

____ Often, when I'm with family and loved ones, I check my work email or messages.

____ I have too little time for the activities that I most deeply enjoy.

____ I don't stop frequently enough to express my appreciation to others or to savor my   personal accomplishments.
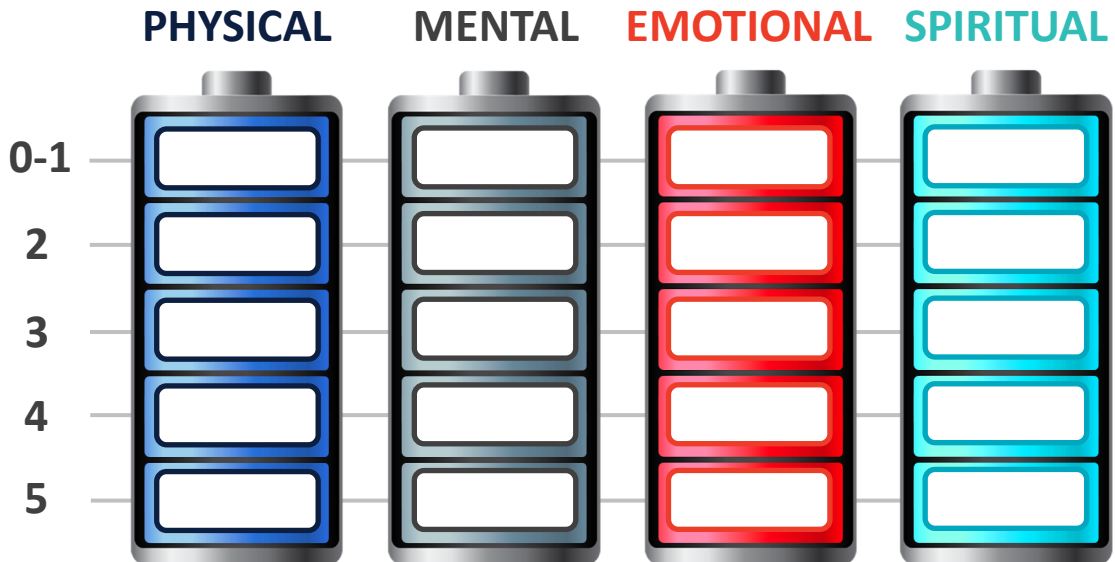
SPIRITUAL   My Score: _____

____ I don't spend enough time at work doing what I do best and enjoy most.

____ There are significant gaps between what I say is most important to me in my life and how I actually allocate my time and energy.

____ My decisions at work are more often influenced by external demands.

____ I have trouble articulating a strong, clear sense of my own purpose outside of work.

____ I don't invest enough time and energy in making a positive difference to others or to the world.

2. Shade the box inside each cell that corresponds to your score. To better visualize your capacity cell indicator, shade any remaining boxes beneath. The higher the score, the closer you are to reaching burnout.

Here's a sample response:

PHYSICAL   MENTAL   EMOTIONAL   SPIRITUAL

PHYSICAL	My Score: 3
MENTAL	My Score: 2
EMOTIONAL	My Score: 4
SPIRITUAL	My Score: 1

PHYSICAL   MENTAL   EMOTIONAL   SPIRITUAL

0-1
2
3
4
5

3. Total your number of checks per capacity cell and determine your overall energy. Shade the box inside the cell that corresponds to your overall score. To better visualize your capacity cell indicator, shade any remaining boxes beneath.

Here's a sample response:

TOTAL ENERGY

0 — 4

5 — 8

9 — 12

13 — 16

17 — 20

Total Shaded = 3
(Significant Deficits)

TOTAL ENERGY

0 — 4

5 — 8

9 — 12

13 — 16

17 — 20
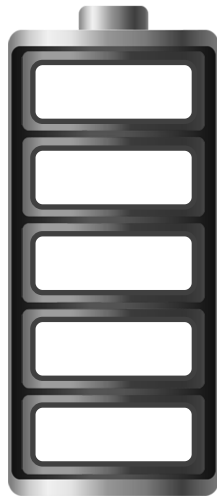
How many shaded bars are in your Total Energy cell?
5: Excellent energy management skills
4: Strong energy management skills
3: Significant deficits
2: Poor energy management skills
0-1: A full-fledged energy crisis

Total Shaded = _____

4. Write down 1-2 changes to **actions or behaviors** for each type of capacity.

Discussion Questions

1. How does this knowledge of being able to allocate your finite energy resource contribute to a more productive life?

2. Have you ever been in a crisis in one of the categories of the capacity cells? How did you manage to rise above the situation?

3. What do you think are the indicators of having full capacity cells and how does that affect your interaction with your care recipients?

4. How do you plan to keep track of your progress as you try to restructure balance in your life?

5. Identify tendencies and current patterns of behaviours that impede you from managing your energy levels effectively. How do you plan to address them?

6. Reflect upon your current situation. What time of the day do you feel you have the most energy? How can you use your capacity cells to your advantage?

4. Burnout Meter

Burnout is a specific type of **work related stress**. It involves physical and/ or emotional exhaustion that result in a sense of reduced accomplishment and a loss of personal identity. It affects your physical and mental health.

1 in 5 Employees are highly engaged but at **risk of burnout**

64% of engaged-exhausted employees report that they work in a good environment, but the workload demand is high. An analysis of 40 previous studies suggests that perfectionism at work may yield higher performance but can lead to burnout.

"**Perfectionistic concerns**" is accompanied by high levels of self-criticism which often leads to physical and emotional exhaustion, detachment or cynicism around work and, feelings of frustrations to reach goals.

$300 billion or more.
U.S. employers lose annually because of stress-related burnout.

Moeller, J., Ivcevic, Z., White, A. E., Menges, J., & Brackett, M. A. (2018, January 25). Highly Engaged but Burned Out: *Intra-Individual Profiles in the US Workforce.*
Leiter, M. P., & Maslach, C. (2005). Banishing burnout: Six strategies for improving your relationship with work. *San Francisco, CA, US: Jossey-Bass.*

The main causes of burnout are

Unreasonable time pressure
70% of employees are **more likely** to experience high burnout if they don't have enough time to do work.

Lack of management support
70% of employees are **more likely** to have high burnout if they don't have strong support from their managers.

Unclear work roles
Only 60% of respondents know what is expected of them. The remaining **40%** will figure out what they are supposed to do. Both often lead to exhaustion.

Unfair treatment
2.3 times likely to experience high burnout due to favoritism, unfair compensation, and mistreatment.

Performance Level

BURNOUT ZONE

POSITIVE STRESS

MEDIUM

Hypostress
Complacency
Negative Fear

PEAK
WILLPOWER

Hyperstress
Anxiety
Negative Fear

BURNOUT ZONE

LOW

LOW
WILLPOWER

OVERTAXED
WILLPOWER

HIGH

Too Little Stress = Burnout

Too Much Stress = Burnout

Stress Level

Wigert, B. & Agrawal, S. (2018, July). Employee Burnout, Part 1: The 5 Main Causes. *Gallup.*

Now look for how you can address burnout in your ERG leadership work:

1. **TAKE ACTION.** Avoid waiting until your stress situation gets out of hand.
   At the earliest time you have recognized and acknowledged signs of burnout,
   do not hesitate to take steps to address it. Talk it out with a trusted colleague or
   friend to proactively regain control of your situation.

2. **SLOW DOWN.** Many of life's stressors arise because we rush through things.
   Pause and evaluate. One way to do this is to practice mindfulness and being
   present in your current activity. Identify what you value most and find time to
   enjoy it—while ensuring you are present during this enjoyment.
   This mindful action-orientation will reduce stress and provide you with a new,
   positive trajectory away from the flames of burnout.

3. **BOUNCE BACK.** Resilience is deeply tied with willpower. If you ever find yourself
   in a setback period, you can always find ways to get back on track or find a newer,
   better path.

4. **PLAY.** Find ways to nurture curiosity and creativity.
   By living these child-like qualities you can see things in new perspectives.

5. **BE AWARE OF YOUR LIMITATIONS.** It's our grand vision of ourselves that often
   puts us on a path filled with stress and anxiety. Be humbled by your limitations
   and leverage your willpower to look for ways where you can re-focus your efforts.
   Humility can pave the path to success.

6. **MAKE TIME FOR YOURSELF.** Do not be overspent on the needs of other people.
   Sometimes, it's okay to find time to look after your needs first (the reliable oxygen
   -mask rule when flying on airplanes). Try to get out of your comfort zones and
   learn something new. Set aside time to relax and reconnect with people
   important to you. If you cannot take care of yourself, how can you make sure that
   you can give the best care to others?

7. **SEEK SUPPORT.** Reach out to loved ones or someone you trust for support.
   It is not a sign of weakness to ask for help. Reaching out for support can help you
   better evaluate your options and get new insights.

Instructions:

Instructions:

1. Identify **3 sources of burnout** that affect you at work.

2. For each, identify whether it is **low**, **medium**, or **high**, based on the scale of the Burnout Meter.

3. Identify a **strategy to minimize** burnout for each source.

Here's a sample response:

Source of Burnout: High Workload demand under time pressure

Strategy: Know your limitations and reach out for support from significant people

Put It in Action

Collaborative Wisdom

If you are gathered with other ERG members, gather into pairs or small groups and share solutions to support one another. Your fellow ERG members serve as passionate, collaborative and dedicated colleagues!

Source of Burnout 1:

Strategy 1:

Source of Burnout 2:

Strategy 2:

Source of Burnout 3:

Strategy 3:

Discussion Questions

1. Why is there value in being aware of your limitations and how can you leverage that knowledge to avoid a stress-induced lifestyle?

2. How can you sustain a more positive outlook when you are under a lot of pressure and hold the responsibilities that come with this stress?

3. How would you identify the signs that lead one to burnout and what usually are your initial steps to address them?

4. When is the best time to reach out for help when burnout is acknowledged and why?

Resources

Resources

As you guide your organization's decision making around Caregiving ERGs, this cheat sheet of additional resources can provide additional statistics, ideas, and best practices.

From AARP

Find all of AARP's resources for employers to create caregiver-friendly workplaces here: https://www.aarp.org/employercaregiving

Supporting Caregivers in the Workplace: A Practical Guide for Employers
https://www.aarp.org/content/dam/aarp/work/employers/2018/11/AARP-NEBGH-EmployerCaregivingToolkit_Practical-Guide-102517.pdf

Small Business Caregiving Online Resource Guide
https://www.smallbusinesscaregivingguide.org/

Supporting Military Caregivers in the Workplace: A Practical Guide for Employers
https://www.aarp.org/content/dam/aarp/work/Work_at_50+/2019/08/military-caregiving-employer-toolkit.pdf

Prepare to Care Resource Guides are designed to help develop and implement a caregiving plan for a loved one or friend. Versions are available in English, Spanish, Chinese languages. Also available in versions specifically addressing the needs of Asian American and Pacific Islanders, Veterans and service member families, and caregivers in the LGBTQ community. Download or order print copies for free at https://www.aarp.org/employercaregiving

Lunch and Learn support. Connect with experienced subject matter experts and members of the caregiving team who will provide important learning material in a web-based training environment, help you navigate available resources and discuss frequently asked questions about caregiving and work. Contact caregiving@aarp.org for more information.

Speakers for your events. If you'd like AARP to present on topics related to working family caregivers, take advantage of our free tools and resources, or discuss strategies in which you as the employer or Human Resource professional can support working family caregivers while offering a competitive advantage to retain and remain competitive in today's workforce, email caregiving@aarp.org to request.

From AARP

Online Manager Training: For Manager of Employees with Caregiving Responsibilities at https://www.aarp.org/employercaregiving is a free, short online training designed for use by all managers at all types and sizes of employers. It raises awareness of the likelihood that direct reports may have caregiving responsibilities, and how to be an effective manager of these employees.

Caregiving in the U.S. 2020 is data packed, actionable resource you can use in myriad ways in your ERG. This report is updated every 5 years and is one of the most often quoted data sources on caregiving. https://www.aarp.org/ppi/info-2020/caregiving-in-the-united-states.html

Caregiving and the Workplace: Employer Benchmarking Survey 2019/2020 is packed with recent data you can use to spark conversation in your ERG and with your organization's leadership team. https://www.online.flippingbook.com/view/907037/

Other Resources

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/

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