



Affiliates and ERGs: *Get Down To Business*

Presented by: Out & Equal Chicagoland Regional Affiliate

Lori Fox: O&E Transgender Advisory Board

Casey Horton: O&E Chicagoland Council

Jim Huberty: O&E Chicagoland Co-Chair

Workshop Objectives



- Understand the key functions that help business operate effectively
- Identify where there are function and skill gaps within the organization of your Affiliate or ERG
- Define and articulate the values of your organization to the company/community
- Discover the relationship between the values of your Affiliate/ERG and the values of your company/community
- Create a statement of value for your company/community
- Develop an action plan that can drive progress toward your Affiliate/ERG strategies and objectives

Introductions



- **Who are you?**
 - What's your organization type?
 - Who are your constituents?
- How would you rate the effectiveness of you or your organization in engaging the business or community in achieving your objectives? (*5 = Very Effective, 1 = Ineffective*)
- What challenges do you experience in achieving your objectives?





Jim Huberty

“Taking Care of Business...Everyday!”

Business Basics

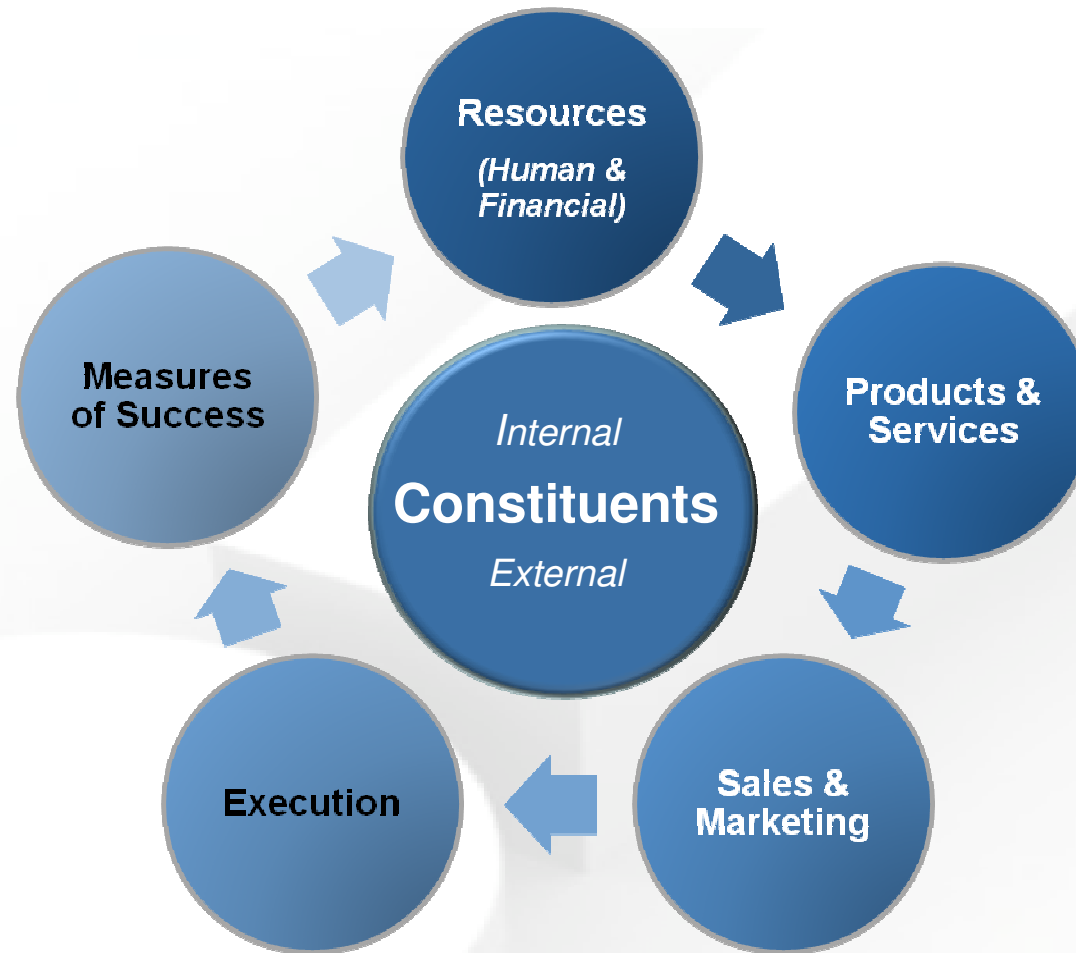


Group Discussion

- How do businesses make money?
- What are the key business functions that make that happen?



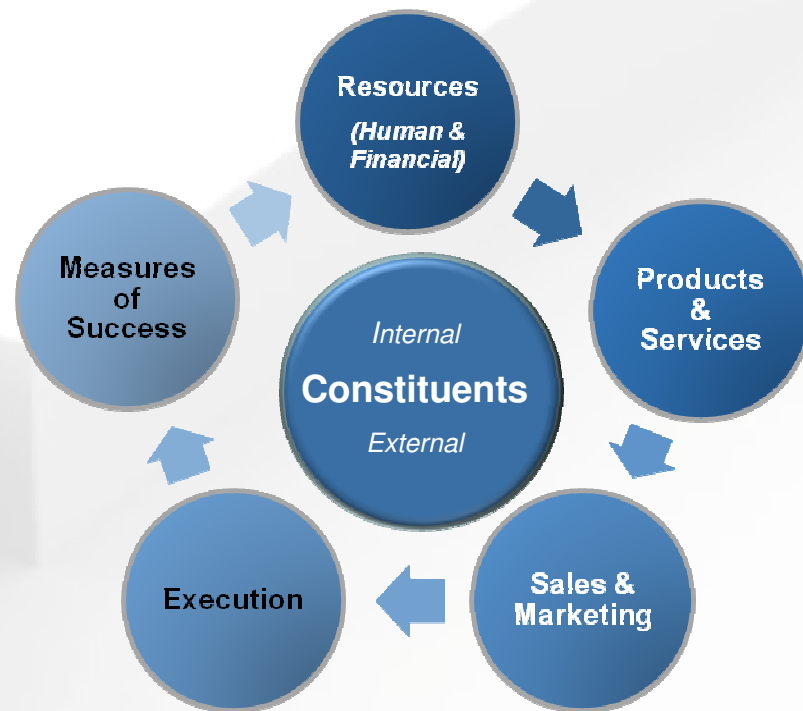
Business Basics





Group Discussion

- What purposes do these key business functions address?
 - Resource Acquisition?
 - Products & Services?
 - Sales & Marketing?
 - Execution?
 - Measurement?



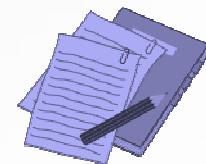
ERG & Affiliate Organizations



Organization Exercise

How is your ERG / Affiliate Organized?

- List each function within your organization
- List the purpose of each function within your organization
- Rate the effectiveness of each of these functions in contributing to your success?
 - 5 = *Very Effective* , 1 = *Ineffective*





Lori Fox

“Values, Objectives and Goals... Oh My!”

ERG & Affiliate Goals & Objectives

2010 Out&Equal
Workplace Summit

October 5–8 in Los Angeles



Group Discussion

- What are the goals and objectives of your organization?
 - Resource Acquisition?
 - Products & Services?
 - Sales & Marketing?
 - Execution?
 - Measures of Success?

Where is your organization?



Group Discussion

- Where do you see similarities between your goals/objectives and those of the business/community you support?
- Where do you see that they diverge?
- What are those differences?

What would happen if...?



Group Discussion

- Are your goals/objectives aligned to the needs of your company or community?
- What happens when they are not aligned?
- What works when they are aligned or congruent?
- What might you change in the goals/objectives of your ERG or Affiliated to better align with the goals/objectives of the company/community?
- Why would it be important to align your goals to theirs?
- Business Partnership!!!!!!

Your Functional Goals



Goals & Objectives Identification

- Referring back to the key functions of organizations, form 5 teams and join the team aligned to the function of your interest
- As a team answer these questions:
 - What are the goals and objectives of your function?
 - In what ways are these goals and objectives aligned to those of your constituent company or community?
 - Record your thoughts and findings & share with the workshop

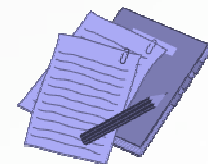


Defining Values



Values Exercise

- How do you know what the values/culture of the company or community you serve are?
- What are the values of your organization?
- How would you describe them in terms of what you deliver?
- How are your values aligned to those of your constituents, company or community?





Casey Horton

“Share our similarities. Celebrate our differences.”

M. Scott Peck

Creating an Action Plan



Development needs

- The areas you want to work on – or build – and the associated competencies you hope to enhance.

Indicators of success

- The areas you want to work on – or build – and the associated competencies you hope to enhance.

Action plan

- The activities you will undertake to achieve your development goals, whether relationships, experiences, learning, or coaching.
- You should make the activities you want to gain as clear and explicit as possible.

Example:

Make & Leverage Connections that Drive Success

2010 Out&Equal
Workplace Summit

October 5-8 in Los Angeles



What is the goal?

- To get more involved in Affiliate events so as to increase the number of connections in my network and to leverage those connections to further drive business success

What volume of resources will you invest?

- ___ hours on planning, organizing and attending an event or activity
- ___ \$\$ on time spent away from the office in order to further involvement

Example:

Make & Leverage Connections that Drive Success

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How will this goal help your organization?

- Increase my visibility and the number of contacts in my network
- Identify business relationships to develop which may lead to business opportunities

How will your performance be measured?

- The number of new people I have added to my network for personal, professional and business relationships
- New / additional sales for the organization

S.M.A.R.T. Method



- **Set objectives that are S.M.A.R.T.**
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-bound

Example: Bad vs. Good



Bad

- *“Increase my visibility and the number of contacts in my network.”*
- *“Identify business relationships to develop which may lead to business opportunities.”*

Good

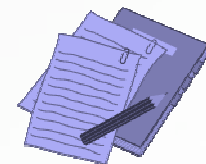
- *“I will expand my network by organizing a roundtable of professionals from Affiliate workplaces that focuses on a shared issue. The estimated effort is 40 hours over two months. My goal is to meet 20 new people, identify at least 3 external people to meet with monthly, identify 2 new candidates for the Affiliate Council and to identify an LGBT mentor.”*

Creating an Action Plan



- List actions that can drive your ERG or Affiliate toward the objective.
 - *Personal Influence & development*
 - *Resource Plan*
 - *Measures of Success*

Specific
Measurable
Achievable
Reasonable
Time-bound



Presenter Contact Information



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Out & Equal Chicagoland Regional Affiliate

Thank You!