

CATALYST

ERG Guide

Establishing ERG governance and structure

Executive summary

ERGs need an organizational structure that supports their leaders, enabling them to be engaged, creative, and effective. Establishing the right roles with the right people, and creating processes for elections and succession planning will drive sustainable, strategic success.

Developing a leadership team

Identifying a strong ERG leadership team and governance structure is vital to success. When an organization has decided to launch an ERG, high-potential employees are often identified as ERG leaders. In other cases, a nomination and selection process among eligible ERG members is implemented. No matter what, leaders should represent the diversity of ERG members and have the interest and energy to devote themselves to the issues.

ERG leaders should possess the following qualities:

- A history of contributing to the organization.
- Credibility with management.
- A passion for the ERG's mission and goals.
- Inclusive leadership skills.
- Strong facilitation skills.
- Strategic thinking.
- Team-building skills.
- Delegating skills.
- Flexibility.
- Strong interpersonal skills.
- Communication skills.
- Strong cultural competency.

ERG leaders must manage a wide range of tasks in the formation and launch of an ERG, such as:

- Coordinate member activities.
- Secure the participation of new members.
- Maintain the ERG's momentum among members and within the organization.
- Ensure the ERG's planned activities support its mission, goals, and objectives.
- Ensure that the ERG's activities are aligned with organizational business objectives and priorities.
- Partner with the ERG's executive sponsor.
- Keep HR, the People and Culture office, and senior management informed of the ERG's work.

- Act as spokespeople for the ERG within the organization and externally.
- Serve as trusted advisors to leadership on both workplace and business issues.
- Act as role models for ERG members.

Formal roles

Successful ERGs are often ones that are officially recognized, supported, and overseen by the organization. Recognition and support typically entail formal roles and responsibilities. An oversight body holds the ERG accountable for its activities. Below are some examples of these roles.

Executive sponsor

The most effective ERGs are sponsored by executives who champion the ERG and ensure strategic alignment with business objectives and diversity initiatives. An executive sponsor is a vital part of the ERG's leadership structure. This person is a senior executive, preferably a member of the highest level in a line organization, and someone who demonstrates visible and vocal support to the ERG by attending leadership meetings and events. The sponsor ensures the ERG's alignment with the organization's goals and champions its mission wherever appropriate. They have personal and professional credibility among senior management, a flexible attitude, and an interest in learning. Importantly, they are an engaging champion because they are excited about the issues and can spread that excitement to others.

Executive sponsors sometimes share the identity of an ERG's core membership (e.g., a Black employee ERG with a Black executive sponsor) and sometimes do not share it (e.g., a Women's ERG with a man executive sponsor). There are advantages to both. When the executive sponsor shares the identity, it can provide a strong sense of representation and relatability to many ERG members. When the executive sponsor does not share the identity, it can demonstrate allyship, encourage others from across demographics to participate in the ERG, show that the ERG's mission matters beyond those who identify with the group, and create opportunities for leaders to learn from different employees' experiences. Ultimately what matters most is the executive sponsor's authentic commitment, ability to advocate and influence, and a willingness to listen.

Among other duties, an executive sponsor:

Works with ERG leaders to:

- Help develop the ERG's strategic plan by providing expertise and insight.
- Act as a sounding board for new policy design.
- Commit to participating in specific activities that support the ERG.

Interacts with organizational senior leaders to:

- Act as a liaison between the ERG and other senior leaders.
- Address any resistance to the ERG, especially at senior levels.
- Link the ERG to other relevant initiatives and/or organizational task forces.
- Demonstrate how the ERG can and will make business contributions.
- Remind leaders that the ERG is a resource they can tap.

Publicly supports the ERG by:

- Interacting with influential managers and opinion leaders throughout the organization to inform them of the ERG's mission and business objectives.
- Publicizing ERG activities and achievements through executive-level presentations, memos, internal and external speaking engagements, and other events.
- Dealing immediately with any resistance or retaliation against the ERG.
- Participating as a speaker or panelist at ERG events.
- Sponsoring ERG activities through attendance and/or financial support.
- Promoting the ERG's mission within their networks by sharing the business case, describing ERG activities, and encouraging others to support and participate in the ERG.

ERG officers

Usually, a core group of ERG leaders — the ERG's officers — works with HR, the People and Culture office, the executive sponsor, and senior leaders to define a business case and set the ERG's direction. The officers determine the ERG's goals and activities, and they are responsible for accomplishing them. A typical core group has a Chair, Co-Chair, or President; Vice Chair, Vice Co-Chair, or Vice President; Secretary; and Treasurer.

Chair, Co-Chair, or President

- Leads the ERG's strategy.
- Acts as the main contact and spokesperson for the ERG.
- Acts as the main contact with ERG executive sponsors.
- Works closely with HR, People and Culture, and senior leaders.

Vice Chair, Vice Co-Chair, or Vice President

- Supports the ERG leader.
- Executes particular initiatives.

Secretary

- Acts as the main contact for public relations.
- Coordinates ERG registration.
- Maintains ERG membership list.
- Acts as official recorder.
- Coordinates elections.

Treasurer

- Develops and maintains the ERG's budget.
- Coordinates fundraising activities.
- Works with local coordinators to allocate funds.

Non-officer ERG positions

Non-officer ERG positions are often filled by volunteers, as opposed to elected by membership or selected by leadership. The volunteers ensure that ERG operations are carried out.

Events/Program Coordinator

- Works with ERG officers to develop and implement programs and events.
- Researches potential issues relevant to members.
- Works with local coordinators to ensure events have enough staff and participants.

Communications Coordinator

- Collaborates with officers and Events/Program Coordinator to ensure that ERG members are kept up to date about activities, events, programs, and elections.
- Liaises with corporate communications to ensure that objectives, activities, successes, and progress are reported to the entire organization.
- Works with ERG leadership, organizational leadership, and HR officers on external communications about ERG activities and achievements.

Membership Coordinator

- Develops strategies to attract new members and retain current members.
- Identifies potential members through internal events.
- Oversees the orientation and onboarding of new members.

Local Coordinator

- Promotes awareness of the ERG at the local physical site.
- Works with Treasurer to develop local budget.
- Plans activities at the location.
- Maintains communication between the local site and ERG officers.

Subcommittees

Once the ERG has defined its business case and developed a strategy, it should begin brainstorming action steps that will fulfill its mission and goals and support the organization's business strategy. It is often useful to delegate responsibilities to subcommittees. Popular subcommittees include:

- Annual heritage and history month observances.
- Business development.
- Communications.
- Community relations.
- Events and programming.
- External business relations.
- Fundraising.
- Leadership forum.
- Marketing/sales support.
- Membership.
- Mentoring.
- Policy.
- Product development.
- Professional development.
- Recruitment and retention.
- Work-life effectiveness.

Succession planning

Leading an ERG can be exhilarating and exhausting. Because of this, it's important to create a succession plan that defines the terms of office and election process. Leadership succession is critical to sustaining the ERG and keeping the ERG and its leaders energized. It can be strange to think about replacing leaders who have just started their terms, but ERGs that avoid succession planning risk that their leaders will experience burnout.

It's common to have defined term lengths as the ERG evolves. Having a core group of initiators who run the ERG for its first few years is invaluable. This consistency in leadership helps build a strong base of support and systems. However, it is equally critical to pass leadership to a new group. Consider two-year staggered term limits, overlapping newly elected leaders with more experienced leaders to ensure continuity and the sharing of information.

Whether the ERG has a single leader, a pair of co-leaders, or a triumvirate at the top, the next generation of leaders should be developed early. Look for members who have taken smaller roles in heading up committees or organizing events. Speak with them about their interests and encourage them to take on more visible roles within the ERG. Identify potential leaders and create mentoring opportunities within the ERG to nurture their interest and talent. Additionally, current leaders should create and maintain detailed documentation and schedule regular knowledge sharing with upcoming leaders in the pipeline for easy knowledge transfer.

Succession planning questions to consider

- Do you have a process for replacing an ERG leader who leaves unexpectedly? Should you have back-ups for each officer role, or co-chairs for those roles?
- What should the knowledge transfer/shadowing/transition period be? Six months overlap with the former leader, to help the new leader get up to speed?
- What else can you do to set up new ERG leadership to be successful? Connect them to important networks? Share the history of the ERG?

Election process

Elections themselves are straightforward administrative processes. It is important to plan your election process to follow your organization's business cycle, ensuring strategic alignment.

For smaller ERGs, elections may be held relatively informally. If all the membership can fit in one room and find the time to do so, it is enough to meet and talk over the question of next year's leadership. Members can volunteer, and depending on how many spots are available, a show of hands can decide the new leader(s) at that very meeting. In this situation, however, it is important to monitor the ERG's size and recognize when it has grown too large for this process.

Larger ERGs often use a formal election process with nominations.

Best practices

- Create and clearly document an election process from start to finish, with timelines, voting periods, and eligibility and voting requirements.
- Develop nomination forms and applications.
- Share summaries of each candidate's qualifications with voting members.
- Set up a secure and anonymous voting process.

In some organizations, HR or corporate leadership appoints leaders. In this way, ERG leadership positions can be used strategically by the organization to place high-potential employees into positions with high visibility.

Some members may need encouragement to take on leadership positions. Likewise, long-term leaders may need encouragement to let go. Someone who has created an ERG and seen it through its infancy can find it difficult to pass on the leadership mantle. While this situation can be problematic, it is necessary to address. Once entrenched leaders step down, continue to involve them in a more advisory role. They have a wealth of knowledge that future leaders will want to access.

ERG leadership development and accountability

Holding ERG leaders accountable for the initiative's success can provide essential incentive to meet their goals. For this to work, ERG participation and leadership roles should be written into members' job responsibilities, including outlining objectives and key results (OKRs). Dedicate official time and space for employees to work on these responsibilities when planning business goals and setting individual OKRs for ERG members and leaders as part of the annual talent management process.

- At **Zoetis**, every CRG meets with TDE&I twice annually for check-ins. In addition, senior leaders who are CRG sponsors are evaluated on how well they've performed these responsibilities during their official feedback and performance conversations. CRG members across groups said that allies are well represented at meetings and events. Kristin Peck and the Zoetis Executive Team model this participation, as they are active across all CRGs.¹

Ideally, ERG leadership reports quarterly or semiannually to the executive sponsor or monitoring body to ensure that the ERG is on track to meet its annual goals. This monitoring keeps the ERG leadership accountable for staying on track with the commitments made at the beginning of the year. Once ERG goals are met, awards, celebrations, and other recognitions of performance can reward and highlight the effectiveness of the leaders involved.

- At **Sephora**, CEO Jean-Andre Rougeot and President Artemis Patrick regularly meet with the leadership team of an INCommunity, checking in on KPI progress and offering ideas of their own. These meetings demonstrate the importance of INCommunities in executing Sephora's DE&I initiative, and are highly motivating to INCommunity leaders, who bear witness to the investment and genuine interest of senior management.²

Explore the guide

- Key ERG concepts
- Building and growing ERG membership
- Developing an ERG
- Cultivating ERG support and collaboration
- ERG programming and initiatives
- Common ERG challenges and solutions
- ERG communications
- Measuring ERG success

1. [Zoetis: Awareness & action drive impact: The Zoetis diversity, equity, and inclusion journey](#). (2024). Catalyst.
2. [Sephora: DE&I heart journey: Practices](#). (2024). Catalyst.

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