

# Best Practices for Employee Resource Group & Affinity Groups Summit



Developing the workforce for the energy transition.



# About Pink Petro & Experience Energy

**P**ink Petro and Experience Energy are the modern talent and culture platforms for attraction and recruitment to serve the needs of the global energy transition. Through its Energy Workforce of the Future™ initiative, the community is a leading source to sharing knowledge, networks, and co-creating solutions to close workforce gaps. As a member, companies, academia, associations and NGOs, collaborate across oil and gas, power and utilities, renewables, and cleantech to address common workforce challenges. Experience Energy is the careers site and recruitment platform that brands industry and companies to reach niche audiences.

The Energy Workforce of the Future™ initiative, is one of the benefits to member companies, universities, and partners of Pink Petro and Experience Energy. The community is the leading source to sharing knowledge, networks, and co-creating solutions to close diversity and inclusion gaps in energy. We value collaboration across oil and gas, power and utilities, renewables and cleantech to address common workforce challenges. This community also values inclusion and diversity of thought and we do invite a limited number of guests to our summit. If you attended the summit and are not a member, we encourage your company, university or affinity network to join.

**Our members, partners and entrepreneur council represent a niche community of resources to help accelerate solutions to the looming energy talent and culture challenge.**





GLOBAL COMMUNITY COUNCIL

# About the Global Community Council

The Global Community Council connects the energy industry to resources and best practices. It provides a neutral platform for dialogue and actions to address equality and inclusive culture. It is for corporate, academic and association members of Pink Petro. The council's work is a progressive movement for change. The energy industry is diverse, vast, and highly fragmented. Companies recognize we need to build inclusion to compete and meet the growing needs for a progressive workforce of the future. We believe our progress will be accelerated by working together. The council meets quarterly. We use technology to enable all meetings. We also have a private app to keep conversations ongoing. This council connects companies of all size to each other and to external initiatives and partnerships with organizations that align with our charter.



## Global Community Council Advisor

### Carol Battershell

CEO, Battersea Energy LLC & Former Department of Energy / BP



## Global Community Council Chairman

### Katie Mehnert

Founder & CEO, Pink Petro & Experience Energy





## Global Community Council Leaders



**Jane Myneni**  
Inclusion & Diversity and  
Engagement Lead



**Nancy Prince**  
HR Partner, Executive  
Development and Diversity  
& Inclusion



**Marisol Ramirez**  
Human Resources Director



**Hether Benjamin Brown**  
Senior Vice President and  
Chief Administrative Officer



**Tracey Kearny**  
Vice President



**Catherine Connolly**  
Organizational Development  
& Learning Manager



**Angela Long**  
Vice President & Chief  
People Officer



**Stephanie Trevino**  
Leadership & Professional  
Development, Diversity  
& Inclusion



**Manasi Pandya**  
Senior Director, HR &  
Organizational Development



**Jazzmine Woodard**  
Diversity, Inclusion & Talent  
Acquisition Strategy



**Eddie Kelleher**  
Leader, People & Leadership



**Stacey Weltmer**  
Geoscience Manager  
Asia Pacific Middle East





**Hillary Holmes**  
Partner

GIBSON DUNN



**Kathy Eberwein**  
Chief Executive Officer



**Melissa Sowell**  
Community Relations Lead  
& Executive Development  
Training Coordinator

HALLIBURTON



**Veness Nettles**



**Lisa Mork Davis**  
Global Account Manager



**Shara Hammond**  
Leadership Development  
& Inclusion Manager



**Vicki Codd**  
Group Marketing Director



**Bonnie Houston**  
Chief Administrative Officer



**Kimberly Border**  
Manager Talent Management



**Pranika Sinha**  
Senior Manager, Talent  
Development & Inclusio



**Anna McKay**  
Career Transition Coach,  
Leadership Development  
Coach, and Founder



**Ana Kopf**  
Manager, Supplier Diversity  
& Diversity Outreach





**Megan Nutting**  
Executive Vice President,  
Policy and Communications



**Souzi Weiland**  
HR Manager



**Shanta Eaden**  
Director, Global IT PMO



**Kerry Sedge**  
Marketing and  
Communications Director



**Nicole Braley**  
Vice President,  
Head of Americas Marketing



**Denise Scibek,**  
SHRM-SCP  
Sr. People Director







## 2020 ERG Summit Team



**Carol Battershell**

CEO, Battersea Energy LLC & Former Department of Energy / BP



**Katie Mehnert**

Founder & CEO, Pink Petro & Experience Energy



**Arquella Hargrove**

Owner D&I Coach & Facilitator, Arquella Hargrove, Inc.



**Marilee Norred**

Sr. Manager - Talent Management & Policy/ Compliance at Sunnova Energy Corp



**Shara Hammond**

Leadership D&I Manager, Marathon Oil Corporation



**Landi Spearman**

CEO of Organized Shift



**Tracey Kearny**

Vice President, Challenger, Gray & Christmas



**Jim Claunch**

Senior Advisor, Bain & Company



**Valentini Pappa**

Academic Program Coordinator, Texas A&M Energy Institute



**Christy Dillard**

Co-Founder, Meraki International



**Louis Huston**

Co-Founder, Meraki International



## Our Entrepreneur Council

Entrepreneurs are the lifeblood of the American economy. We are proud to work with:

EPIC  
COLLABORATIVE  
ADVISORS



## Our Partners







# ALONE WE GO FAST. TOGETHER WE GO FURTHER.

– African Proverb

**P**ink Petro launched in 2015 conceived with the goal to identify energy networks and workforce initiatives to accelerate the progression of diversity and inclusion in energy. Alone we can go fast but together we can go further. In 2016, we launched the Global Community Council for early companies that invested in membership. By 2019, that membership grew to over 30 companies including oil and gas, utilities and alternatives. In the fall, the Energy Workforce of the Future summit brought together energy executives, influencers and other thought leaders to discuss how the energy sector can become a leader in attracting and retaining the next generation workforce. The participants included 78 companies and 10 leading affinity groups in energy.

At the first summit we determined we would set the vision and tackle four key focus areas: the sharing of best practices, industry attractiveness, inclusive culture, and measuring D&I performance. In March 2020, just before the COVID-19 pandemic, we held our first summit on ERG and affinity network best practices. This report includes insights and recommendations on the way forward.

With the recent oil price plunge and the the pandemic, professional development is more important than ever. Despite this environment, our Global Community Council, members and partners benefit by leveraging our collective resources to continue building talent and culture for the future.

Respectfully,



*Katie Mehnert*

**Katie Mehnert**

Founder & CEO, Pink Petro & Experience Energy



## ERGS &amp; AFFINITY GROUPS

# Content and Learnings from the Participants

## ERGs

Employee Resource Groups (ERGs) are groups of employees within a company who identify with or share the concerns of a gender, race, national origin, age, disability, sexual orientation, or other characteristics. They provide community for employees who often feel excluded. They provide benefits for the company as well – promoting diversity in the company, aiding employee development, assisting recruitment and retention. ERGs also provide an opportunity for senior management to connect with and hear from diverse employees.

**“ERGs were the most natural way to start bringing my true self to work.”**

Confusingly, the ERGs are also referred to as Business Resource Groups or Diversity Networks or Affinity Groups. Affinity Groups and Diversity Networks can both mean employees within one company organizing around a shared identity and employees from multiple companies organizing around a shared identity outside of their workplace. In the summit and in this note our conventions will be to use the terms as **ERGs are groups internal to one company and Affinity Groups are external organizations that employees from multiple companies join.**

What keeps employees from joining ERGs or Affinity Groups?

- Sometimes they are not valued and are viewed as a social function.
- There are too many options and prospects are overwhelmed with too much information.
- There's a perception of exclusion (e.g. no men in a “women's” group).
- ERGs are sometimes unappreciated work for members who lead and run the group.
- There's a bias against joining as employees don't want to feel segregated.

Many employees do join ERGs and they have views on what's working well and what needs improvement. The summit participants shared the following best practices to help address the issues that keep employees from joining or continuing in an ERG.

- It is critical to have an active and engaged senior executive sponsor.
- ERGs need to be formed by employees, bottom up versus top down.
- Line managers need to participate to show support for their employees.
- HR should be involved in the early development of an ERG.



- The organization should host an all ERG open house membership drive once or twice a year to drive awareness.
- ERGs should be mindful of using a joint calendar to cross promote and schedule activities so they do not conflict.
- Companies should form a network of ERGs leaders and have them periodically to align on best practices.
- When employees sign up for an ERG, have them indicated “identify” or “ally” and encourage allies to join and participate. Everyone should feel comfortable to participate in an ERG.
- Make the value proposition of the ERG clear to the bottom line of the company.
- Involve ERGs in recruiting and gave them review job postings.
- Use technology to support ERGs in communication like Workplace, Yammer, and Microsoft Teams.
- Regarding ERG programming:
  - Draw ideas for agenda and activities from the employees/members
  - Include remote sites as well – remote events and live stream HQ events
  - Have a mix of both online and face-to-face events
  - Having some small meet-up options allows for more personal networking
  - Align some topics with the business mission
  - Choose some topics that resonate with men and women (black and white, the people in the diversity group and their potential allies)
  - Make events valuable
  - Make events accessible



**THE MOST IMPACTFUL OPPORTUNITIES WITH ERGS ARE THE INTIMATE CONVERSATIONS.**





## “IF LEADERS DON’T COME TO ERG MEETINGS, ARE YOU REALLY SAYING IT’S IMPORTANT?”

And while implementing these best practices would increase the effectiveness of ERGs, the summit participants also saw gaps where new solutions are needed. For example, they thought it would be beneficial to connect ERGs across companies and that Pink Petro could help convene the member company ERGs.

**Sharing ERG Best Practices** As one of the missions of the summit, the documenting and sharing is being implemented through this note and posting the information on the Pink Petro/Experience Energy site. **Recommendation #1:** Create a group on the Pink Petro / Experience

Energy member community site and encourage all practices to be shared and evergreen.

**Connecting ERGs** Participants saw value in connecting ERGs internally and connecting across companies and industry. **Recommendation #2:** Pink Petro Global Community Council could convene ERGs across companies more regularly.

**KPIs for ERGs** Summit attendees commented its challenging to define what ERGs are trying to achieve and that KPIs are lacking. What is the success criteria? Quality of programming, degree of executive

support, participation levels?

**Recommendation #3:** Pink Petro could develop a set of ERG KPIs to propose to the council for review and recommendations.

**Build ERG mentoring capacity** Employees joining ERGs are often seeking, but not always finding mentoring. While other mentoring programs exist, like Lean In Energy, it seems ERGs are particularly well suited for peer mentoring. Pink Petro could assist by publicizing known high quality mentoring programs as well as providing a set of resources for member companies to use to help ERGs conduct peer mentoring.



## AFFINITY GROUPS

The term Affinity Groups is being used to describe organizations of people gathered from multiple companies, and sometimes multiple industries, who identify with or share the concerns of a gender, race, national origin, age, disability, sexual orientation, or other characteristics.

ERGs and Affinity Groups can both assist a company in recruiting and retention. ERGs can give employees community in a group actively sponsored by a senior executive; companies can seek input from

ERGs on needed policies to retain employees and have ERG members weigh in on language in job postings and composition of hiring committees. Affinity Groups also provide community, networking and can be a potential source of recruitment for companies.

Most of the many affinity groups express similar high-level missions - to build and support diversity in energy. The groups have initiatives and activities that are sometimes unique and sometimes very similar. The many groups are organized by gender, ethnicity, geography, type of energy, or a combination of these.

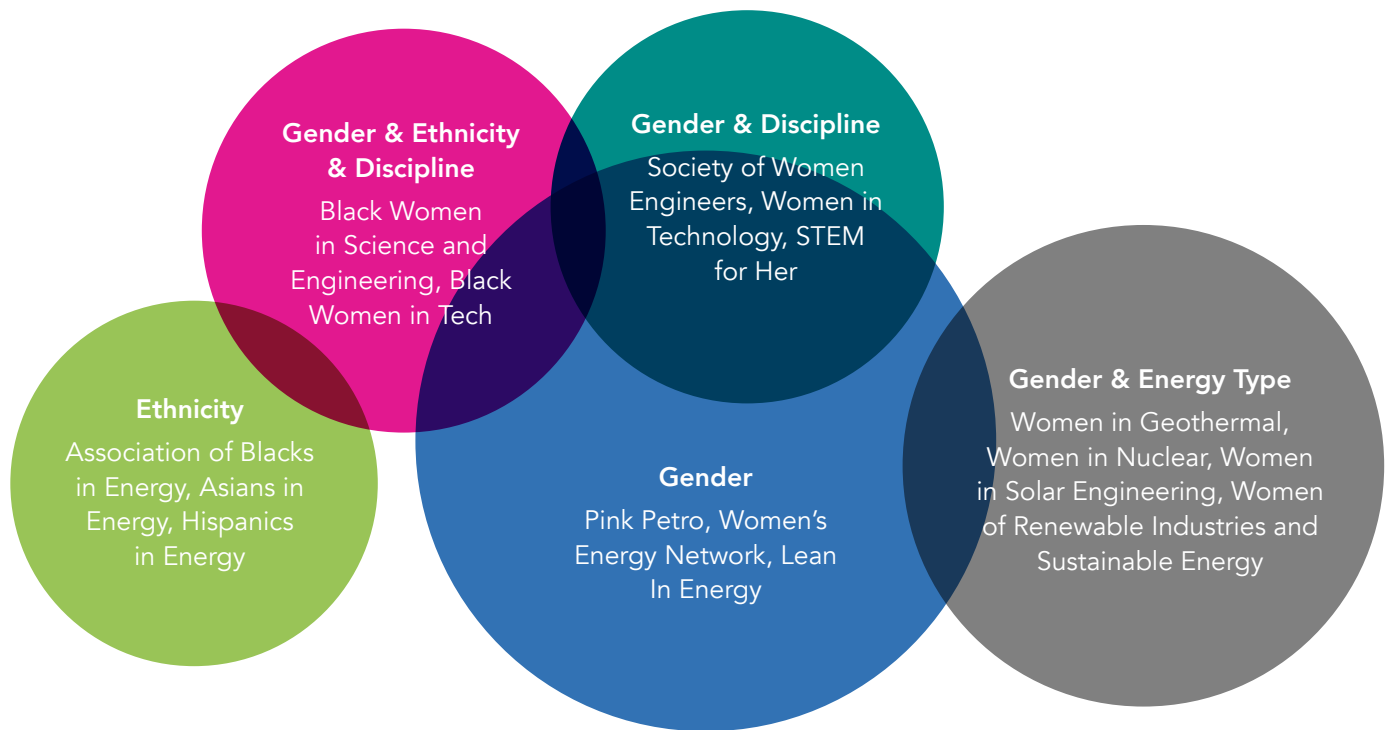
Pink Petro is an Affinity Group; it is an online community for all types of diversity in all types of energy. Pink Petro has been compiling a list of affinity groups, initiatives, and programming to support an inclusive workforce. This resource currently includes 100 sources and was presented at the first Workforce of the Future Summit in October 2019.

**Recommendation #1:** Continue to develop the resource database on the membership site allowing more inputs, rankings and ratings.

“AN AFFINITY GROUP CAN BE A LIFELINE IN A DOWNTURN”



## Affinity Groups: Organizing Design with Examples



A significant learning from the summit discussions was that there seems to be a generational difference in the use of affinity groups. Baby Boomers and Gen X's at the summit often listed several affinity groups in which they participated. Millennials at the summit shared they don't look into traditional affinity groups, they use social media instead. Has social networking replaced affinity groups for younger generations?

**“Our first priority is one-to-one connections and we use a conference or Pink Petro or other social media to find someone and add them to our network”**

The summit participants agreed they were looking for a way to deal with the complexity and multitude of Affinity Groups, and several different discussion roundtables suggested the same solution – an app.



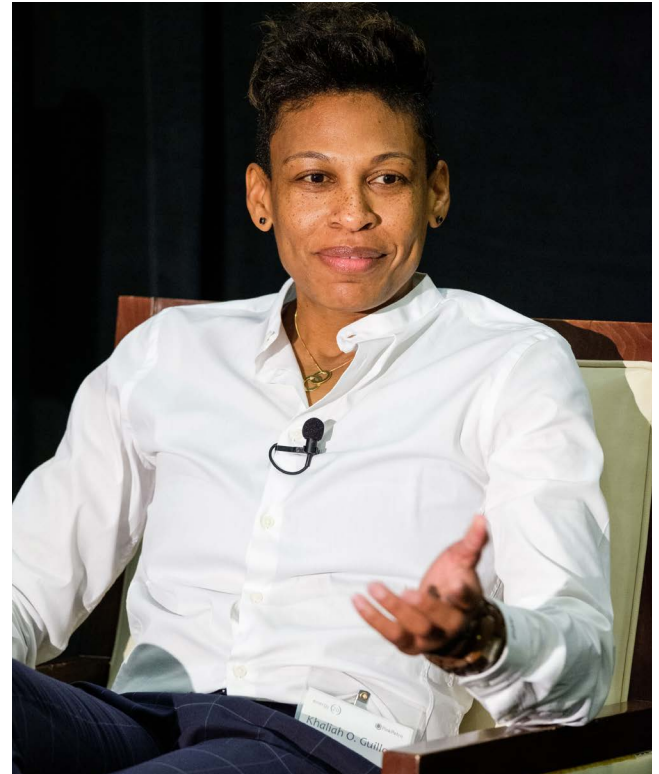




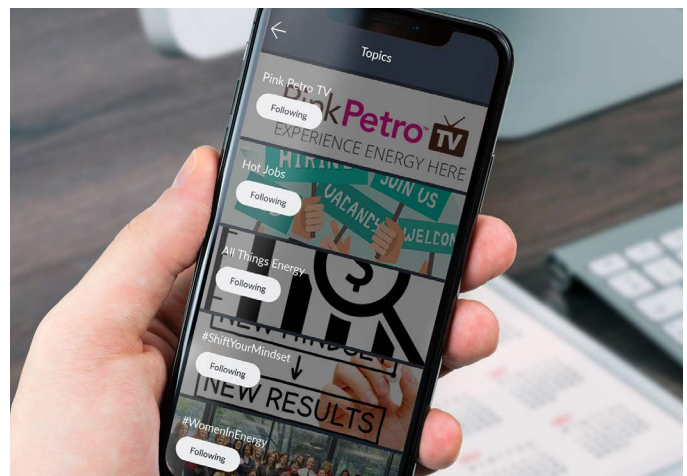
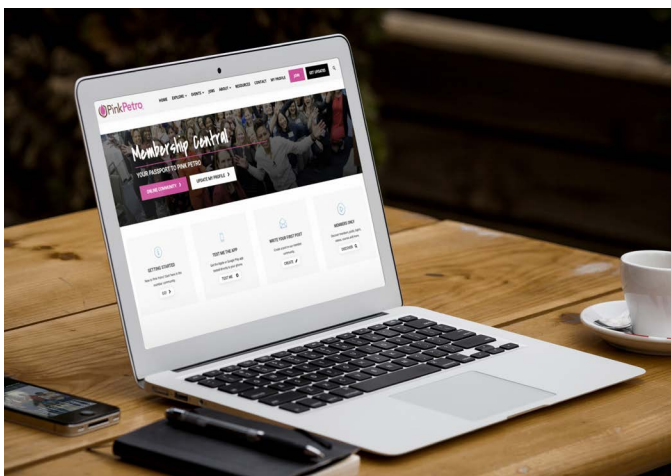
This was a solution that made sense to all generations. Attendees would be very interested in software which could help them locate just the type of Affinity Group that would be most useful to them. The software for an app could help “find your tribe for you”, locate a group with the attributes you are seeking like which initiatives, local or regional, which types of diversity, etc.

**Recommendation #2:** Accelerate use of Pink Petro community and app extending it to all ERGs and develop affinity groups online to connect and share knowledge.

**“We need a highly searchable app with refined recommendations for affinity groups.”**



**“I FEEL LIKE WE’RE DATING. WE’RE TRYING TO IDENTIFY AND FIND THE RIGHT AFFINITY GROUPS TO JOIN ... I DON’T EVEN KNOW WHAT TO TRY OUT.”**



## MENTORING

**M**entoring seems to be an important topic to participants. And diverse employees often look to both ERGs and Affinity Groups for mentoring.

**“The power of mentorship helps with retention. It helped when I felt like quitting my job or even leaving the industry.”**

Many types of mentoring were described and the type of mentor needed also varies.

### Mentoring Types



**Classic / Leadership:** Designed to gain insights from a senior leader, for building general leadership skills for career development.



**Reverse Mentoring:** Designed to give insights to a senior leader. Participants mentioned they thought it was most useful when this senior leader was a white male.



**Peer Mentoring:** Mentoring Circles provide support from peers, and these circles offer the opportunity to hear more than one perspective.



**Insider:** New employees (and existing employees) seek insights on company norms.



**Technical:** When seeking technical skills development a more senior person in the same area of expertise is desired.

Best practices raised in roundtable discussions included:

- Have more than one mentor to get different perspectives
- Build a broad network to find your connections
- Define roles and expectations – for the “program” and for interactions between the individuals

- Formal mentor ‘assignments’ can be awkward and not as successful as ‘organic’ connections
- Be willing to say (and stop) when the fit is not right

Even using their shared best practices, the summit participants are still seeking assistance in several areas:

### Supply of Mentors

**Recommendation #1:** Pink Petro could identify methods to increase the number of mentors.

**Build Mentoring Capacity** Employees joining ERGs and Affinity Groups are often seeking, but not always finding mentoring.

**Recommendation #2:** Pink Petro could develop a resource for members to use to help ERGs and Affinity Groups to conduct peer mentoring.



Lean In Energy Board with LeanIn.org Founder, Sheryl Sandberg.

**“THE PARING IS SO IMPORTANT FOR MENTORING.”**

## INCLUSION AND METRICS

Inclusion and Measuring Inclusion were two of four themes from first summit. Given the importance of the topic to diverse employees - and that inclusion is not yet present in most workplaces - it is not surprising that these topics were raised in the roundtable discussions even though they were not the listed topics.

Several tools for assessing D&I were listed in the first summit and additional tools were mentioned in this summit. For reference the list of tools identified in both summits was compiled.

Goals and objectives for D&I need to be better detailed and then measured from entry to board level. In many cases these targets could be incorporated into existing company programs:

- D&I questions should be included in company "people surveys"
- D&I should be part of the performance metrics and tied to compensation
- 360 degree reviews should include questions to assess if leaders are inclusive
- Build D&I into the supply chain and the T&C vendor agreements

External information sources and important indexes in which companies should participate, include:

- Gender Intelligence Group inclusion assessment survey tool
- Bloomberg D&I Index
- The Corporate Equality Index

- The Experience Energy Diversity, Inclusion & Sustainability Index
- LeanIn.org and McKinsey & Co Women in the Workplace study
- Forbes 100 Best Places to Work (Where energy is not represented)
- Rice University Kinder Institute study on workforce diversity
- National Diversity Council – Diversity First Certification
- Weatherford is putting annual report together now

- LeanIn.org Inclusion Tools

**Recommendation #1:** A few Pink Petro companies pilot some of these tools and share the results at the future summit

**Recommendation #2:** Pink Petro community to design and implement an Energy D&I Certification Program with KPIs and sustainability metrics.







## CONCLUSION AND NEXT STEPS

**T**he Energy ERG and Affinity Networks Best Practices Summit was our first attempt at bringing together ideas, organizations, and passionate advocates together.

### NEAR TERM RECOMMENDATIONS

**Recommendation #1:** Socialize the findings from this report with the summit attendees and council.

**Recommendation #2:** Pilot the technology and tools: Create online groups (e.g: ERGs/Affinity Group leaders, parenting group, in-transition professionals) on the Pink Petro member community and app where we can continue to share.

**Recommendation #3:** Recruit a host committee for the next ERG/Affinity group summit, to be determined.

### LONG TERM RECOMMENDATIONS

**Recommendation #1:** Create an ERG/Affinity Group Digital Toolkit with suggested KPIs and leverage practices shared in the member community to keep it evergreen.

**Recommendation #2:** Develop a strong KPI framework for assessing D&I (and specifically not just for networks) but for inclusive culture.

**Recommendation #3:** Investigate the development of a D&I Certification Program that provides companies the tools, education and frameworks to implement ERGs (as a part of a larger offering).