

The Struggle to Juggle: Employee Resource Groups reconciling  
Community and Business Priorities

A thesis submitted by

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# THE STRUGGLE TO JUGGLE

## Abstract

This thesis explores contributions of Employee Resource Groups (ERGs) to the communities they represent and the organization as a whole from the perspectives of a range of stakeholders. A case-study of three attribute-centered ERGs in one global financial services firm informed the analysis. In-depth interviews with ERG leaders, Executive Sponsors, and company decision-makers indicate broad consensus on ERGs' value to both community and business priorities. However, stakeholders emphasized different contributions and challenges. Three models that characterize how various ERG actors navigate complementary and competing priorities provide a more nuanced and dynamic understanding of tensions between social justice and business rationales for ERGs. The research also offers novel insights into the benefits of ERGS for members, other employees, workplace culture, and firm productivity. It highlights challenges of time constraints, burnout, and lack of recognition, acknowledges potential for firm-level support for ERG efforts, and proposes directions for future research and practice.

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### Acknowledgments

I have never experienced such profound gratitude and satisfaction for the work and its journey. This project has been incredibly fulfilling and rewarding, made possible by the invaluable support of everyone involved. The acknowledgements are in no specific order.

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Mama, danke, dass du für mich da bist. Du hast immer für mich gekämpft und mir meine Träume ermöglicht. Du hast mich geprägt und warst mir ein starkes Vorbild. Papa, danke, dass du mich bestärkt hast, als ich an mir gezweifelt habe. Auch wenn wir immer weit entfernt voneinander sind, werden wir uns doch immer nahe sein. Mama, Papa: Ich weiß, dass einige Themen, die mich bewegen, nicht immer Sinn für euch ergeben. Ich hoffe, ich konnte euch dennoch stolz machen. Danke für alles, ihr bedeutet mir die Welt.

During Laurie's course, we introduced the tradition of singing. Throughout my graduate studies and moving across various states and continents, I always remembered the lyrics: *Your heart knows the way home.*

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### Positionality

My positionality is shaped by experiences as a white woman socialized in a society of the global north where certain identities are considered the societal norm. I obtain both privileged identities (among them being white, cisgender, gaining higher education) and marginalized identities (among them being a woman, queer, first generation to gain higher education, growing up low-income). My identity both as an individual and as a researcher is shaped by all identities I hold. As a result, depending on the context, I am privileged in some, but not other identities.

The research questions partly reflect my lived experiences and my desire to create positive change in workplaces. I am deeply aware of the power hierarchies attached to conducting research. It is my aspiration to center the voices of the participants rather than researching about them from a distance. As an individual, I have been a member in and have been working for ERGs at various companies and industries (Financial Sector, Marketing, Strategy Consulting) and across multiple countries (mostly Germany, Switzerland, and Austria as well as in the U.S.) hence spanning several cultural settings. Previous experiences in the Global Financial Sector as well as my current occupation at EY Parthenon will likely shape the way I interpret the findings, but also enable me to be aware of sensitivities.

Hence, my positionality as a researcher is informed by personal experiences and my commitment to create more just and equitable workplaces. I will approach my research with humility, curiosity, and a dedication to centering the perspectives of those whose experiences I am interested in understanding instead of researching about them, which could manifest power hierarchies. Because of this aspiration, I checked my interpretations with the interlocutors. By doing so, I aimed to mitigate any biases and provide an opportunity to be part of the research process along several touchpoints.

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## 1. Introduction

Employee Resource Groups (ERGs) are self-organized, voluntary, employee-led groups within companies, mostly originating from grassroots efforts, and provide a place to meet for members who share similar commonalities (Friedman & Holtom, 2002; Singh et al., 2006; Van Aken et al., 1994). Since their inception in the United States in the 1970s, they have transitioned into a global phenomenon; ERGs are prevalent in more than 90% of Fortune 500 companies (*90% Of Fortune 500 Companies Already Have A Solution To Gender Equality But Aren't Utilizing It*, 2017; Foldy, 2019; Friedman & Deinard, 1991; Welbourne & McLaughlin, 2013). Despite the widespread use of ERGs for promoting diversity, equity, and inclusion (DE&I) in organizations, there is a noticeable lack of comprehensive research efforts in this area (for a detailed literature review see Foldy, 2019).

Prior scholarship on ERGs has yet to fully explore how these groups operate in practice, particularly in balancing and aligning multiple demands and rationales (Byrd & Sparkman, 2022; Foldy, 2019; Schlachter et al., 2023; Slooman, 2022). Nor has research examined how different stakeholders – including ERG leaders, company decision makers, and Executive Sponsors (who bridge the gap between the ERG and the company) – perceive the operation of ERGs across different levels of action (the individual, the group, the workplace, the firm), including support mechanisms and potential challenges. Furthermore, research on ERGs focused on understanding the experience of ERG members and ERG leaders (Baker, 2009; Cenkci et al., 2019; Friedman & Holtom, 2002; McFadden & Crowley-Henry, 2018; McPhee et al., 2017; Schlachter et al., 2023; Singh et al., 2006). The scholarship about ERGs thus misses perspectives from Executive Sponsors and company decision makers.

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Moreover, previous research has predominantly examined DE&I from either a business or a social justice perspective (c.f. Byrd, 2022; Byrd & Sparkman, 2022; Ely & Thomas, 2020; Johns et al., 2012; Tomlinson & Schwabenland, 2010; Van Dijk et al., 2012; Welbourne & McLaughlin, 2013). The business case presumes that DE&I should positively impact the firms bottom line. In contrast, the Social Justice case – or Community Case – posits that achieving equity is a desirable outcome in itself (Byrd & Sparkman, 2022; Slootman, 2022). The Community Case places the ERG community at its core to serve the interests of their members. In ERGs centered around a shared social identity, those interests often pertain to achieving more visibility within the firm, and having a space to have open dialogues, meet similar others, and build a strong community.

Particularly in the context of ERGs, scholarship has yet to fully understand the inter-relationships – with one noteworthy exception (c.f. Slootman, 2022). This case-study of three attribute-centered ERGs – ERGs that revolve around a shared social identity that is underrepresented or discriminated against in the workplace (Welbourne & McLaughlin, 2013) – in one global financial services firm aims to help address these gaps.

I examine how ERGs balance multiple demands and rationales from the perspectives of different actors, including ERG leaders, company decision makers, and Executive Sponsors. Their perceptions highlight their contributions at different levels (the individual, the group, the workplace, the firm). The distinct role of Executive Sponsors is particularly valuable for current studies. Furthermore, I will look at the value ERGs generate for both the community and business. This study thus emphasizes and offers novel insights on community vs firm priorities at the level of ERGs. An examination of the effectiveness of ERG efforts is beyond the scope of the project.

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In-depth interviews with 20 stakeholders including eleven ERG leaders of three ERGs, four decision-makers, and five Executive Sponsors as well as observations of three strategy meetings where ERG leaders and company decision makers discuss the ERG strategy of the upcoming year inform the inquiry.

The title of the thesis – *the struggle to juggle* – captures the essence of the findings. Many interviewees noted the struggle of having to balance multiple responsibilities, both pertaining one’s job and ERG work. Some struggled to maintain their commitment to ERGs and stepped down. Yet others noted the struggle to juggle various demands, ranging from their personal careers, private lives, and community to business objectives of the ERG. ERG leaders are tasked to ensure they are not overprioritizing one side over the other. The title thus signifies the complex and delicate balancing act that ERG leaders must navigate in order to support both the needs of their members and the objectives of the organization.

In sum, all stakeholders acknowledge the value ERGs bring to both the community and the firm, albeit with varying emphasis on specific aspects. Consensus exists on the benefits ERGs offer in community building, relationship development, and providing a safe space. However, perspectives varied with respect to the level of involvement and alignment with business objectives. Further differences pertain to the challenges and frustrations observed by ERG leaders. Additionally, ERG leaders' frustrations with observed challenges persist despite awareness from company decision makers.

The introduction of three models – Community First, Business First, and Dynamic Interplay – offers a framework to elucidate the interplay between ERG dynamics and their value to both the business and community. These models contribute significantly to our understanding

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of ERGs, addressing the current gap by systematically exploring and comprehending these intricate dynamics.

The next chapter situates the practical relevance of ERGs in an overview of current scholarship concerning their theoretical background, functions and benefits. Chapter 3 presents the research design including the rationale for selecting the case company and the data collection and analysis methodology. Chapter 4 describes the ERGs as they situated in the case company, the history of their formation, and the organizational infrastructure that supports them. I describe the research findings about the perspectives of ERG leaders, firm decision-makers, and Executive Sponsors in Chapter 5. Chapter 6 introduces three models that illustrate observed dynamics related to both community impact and business value generated by ERGs. I conclude by advocating for using these models as a framework for assessing the status quo relating to ERGs while also identifying areas where ERGs and/or organizations are potentially impacted in an unwelcome way.

### 2. Literature Review: ERGs – Theoretical Background, Functions, and Benefits

Today's Employee Resource Groups (ERGs) date back to the 1970s when, in pursuit of establishing fair pay and an equitable work environment, Xerox was the first company to address racial equity and pioneered the formation of an identity-based network in 1970 named "National Black Employees Caucus" (Dobbin & Kalev, 2022; Friedman & Deinard, 1991; Rolf et al., 2016). Today's groups still utilize the first Caucus as a blueprint (Dobbin & Kalev, 2022), though a variety of names have emerged: Employee Resource Groups (c.f. Rolf et al., 2016; Scully, 2009), Employee Network Groups (c.f. Friedman & Holtom, 2002; Githens & Aragon, 2009; Scully, 2009), Caucuses (c.f. Scully & Segal, 2002), Affinity Networks/Groups (c.f. Briscoe & Safford, 2010; Douglas, 2008; Foldy, 2002; Scully, 2009; Van Aken et al., 1994), and Employee Business Groups (c.f. Katz & Miller, 2020). In this thesis, they will be referred to as ERGs, aligning with the terminology used within the company where the data is gathered.

Welbourne and McLaughlin (2013) established a taxonomy for categorizing ERGs into three clusters, reflecting the reason why ERGs come together and the causes they care about; ERGs are social cause-centered, professional-centered, or attribute-centered. Notably, attribute-centered ERGs revolve around a shared social identity that is underrepresented or discriminated against in the workplace. They are the most commonly observed and also the ones that have the most scholarly attention (Dobbin & Kalev, 2016; Foldy, 2002; Friedman & Holtom, 2002; Scully, 2009).

The absence of an overarching theory places some limitations on understanding how ERGs operate within organizational contexts (Byrd, 2022). The structure of employee-led groups varies from firm to firm, yet researchers have observed some common features. They are usually open to all employees (Colgan & McKearney, 2012; Friedman & Holtom, 2002); they are

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voluntary in nature (Singh et al., 2006); their members meet regularly; and groups have formal membership roles as well as a group charter and a mission (Van Aken et al., 1994). Unlike unions that are restricted by collective bargaining laws in the U.S., these groups are not legally recognized (Briscoe & Safford, 2010).

Employee-led groups can either be fully institutionalized with full organizational recognition or remain unrecognized by the organization (Githens & Aragon, 2009). On one end of the spectrum, there are self-organized grassroots efforts stemming from employees who identify a need (Friedman & Holtom, 2002). Less commonly observed, on the opposite end, are initiatives driven top-down by management (Dobbin & Kalev, 2022). Because most ERGs are based on a shared group identity (c.f. attribute-centered ERGs; Welbourne et al., 2015), they usually emerge bottom-up. Researchers indicate that networks originating initially unrecognized grassroots efforts often validate their existence by emphasizing organizational effectiveness, hence transforming towards being organizationally recognized (Benschop et al., 2015; Githens & Aragon, 2009; Gremmen & Benschop, 2011).

### 2.1. The value of ERGs for their Members and Leaders

Previous research has shown some ways in which attribute-centered ERGs benefit individuals. Marginalized individuals join ERGs based on their group identity. People classify themselves into meaningful social categories through membership in and belongingness to social identity groups (c.f. Tajfel, 1978; Tajfel & Turner, 1986). Research suggests that individuals are more likely to join ERGs the more they identify with that particular identity (e.g. being a woman, Black, and/or queer) (Friedman & Craig, 2004).

ERGs provide a space for employees who share a social identity to meet, and gain social support (Friedman & Craig, 2004; Friedman & Holtom, 2002; Githens & Aragon, 2009; Scully,

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2009). For individuals, attribute-centered ERGs provide an opportunity in the workplace to derive a sense of self from their membership in social groups and build ties with employees with similar identities and experiences (Friedman & Craig, 2004; Baker, 2009). By building or enhancing work relationships with colleagues, participation in ERGs is believed to positively affect workplace inclusiveness, as they help share information, and build trust and cohesiveness (Cenkci et al., 2019; Singh et al., 2006; Van Aken et al., 1994). In short, such groups can counter social isolation (Dennissen et al., 2019).

Particularly marginalized individuals often lack visibility in organizational settings. This includes being seen as one's full self, rather than being reduced to singular facets of one's identity (Buchanan & Settles, 2019). One strategy for contending with invisibility and silence is to join an ERG. Some research suggests that ERGs serve as a collective voice mechanism and therefore as an attempt to invoke changes (Bell et al., 2011; Colgan & McKearney, 2012; Hirschman, 1970). For example, in a case study of 149 LGB employees within 14 UK organizations, Colgan (2016), found that LGBT groups provide an avenue for individual and collective voice, visibility, and community for LGBT employees. By giving voice to employees, members can highlight issues that impact their membership and can therefore challenge the organization (Bell et al., 2011; Green et al., 2022). Research by McNulty et al., (2018) indicates that management plays an active role in whether ERGs can function as a voice mechanism.

Visibility with senior executives helps build networks, boost one's career, and enable receiving mentorship (Byrd, 2022; Friedman & Holtom, 2002; Singh et al., 2006). For instance, some scholars have found that ERGs create leadership and management opportunities for marginalized employees (Welbourne and Ziskin, 2012, cited in Welbourne et al., 2015).

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Employees initiate ERGs because of their personal passion (Schlachter et al., 2023; Scully & Segal, 2002). However, sustaining passion for ERG work and workplace activism in general can be difficult as underscored by Scully and Segal (2002), whose study found that sustaining passion fluctuates. A decreased sense of passion might correlate with navigating the demands of people's day jobs with their ERG commitments (Jachimowicz & Weisman, 2022). Bierema's (2005) case study of a women's network shows how its members felt too burdened by their existing job responsibilities to take on extra tasks within the ERG. This finding is supported by Schlachter and colleagues who as a result identified a decreased commitment to the ERG work (2023). Baker's (2009) research on Black and Hispanic ERGs echoes this, showing that ERG members tend to prioritize their main job duties, especially when their involvement in the ERG begins to negatively affect their work performance or their supervisors' perception of them. While employee passion leads people to stay committed to a cause, a lack of organizational support can lead to constraints, and even to members restricting their participation in ERGs at all (Baker, 2009).

### 2.2. The value of ERG for the Community and Workplace

The ERG community includes employees who share the identities represented by the ERG. When referring to the "community," I include ERG members and leaders who share the attribute the ERGs is centered around, allies<sup>2</sup>, and those employees who identify with the ERG's cause but are not part of it. The term "workplace" expands on the latter by including all employees – regardless of their ERG affiliation. Workplace culture refers to the community and procedures of the organization. I am hence not using the terms interchangeably. ERGs foster

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<sup>2</sup> Following De Souza and Schmader (2024, p. 4), allyship can be defined as: „a custom (a) comprised of several actions rather than one action alone taken by advantaged group individuals, which are (b) motivated by egalitarian goals to support outgroups that are disadvantaged and are (c) recognized as supportive by those they seek to support.“

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community development among employees sharing similar social identities, especially among those employees who would usually not meet in the organization. ERGs are thereby offering support to members who are underrepresented (Dennissen et al., 2020; Friedman & Holtom, 2002; Schlachter et al., 2023). According to some scholars, ERGs foster a more inclusive work environment (Byrd, 2022). Inclusive work cultures signify a sense of belonging to the firm (Morganson et al., 2010). Research by Cenkci et al. (2019) found that workplace inclusion of ERG members includes feeling valued and respected, because of one's opportunity to network, communicate to executives and because of development opportunities.

ERGs have also been successful in creating policy changes, such as partner benefits for queer employees (Githens & Aragon, 2009; Schlachter et al., 2023). Studying a women's ERG, Singh et al. (2006) found that their involvement in HR was able to influence the length of paid maternity leave. Others have found that a Hispanic ERG contributed to increased acceptance and understanding among cultures through events that were open to everyone (Schlachter et al., 2023). Yet others observed that an LGBT ERG influenced diversity training and domestic partner benefits (Githens & Aragon, 2009).

### 2.3. The value of ERGs for the Organization

Research shows that firms are interested in supporting ERGs as tangible proof of their dedication to diversity, equity, and inclusion (Douglas, 2008; Green et al., 2022). ERGs have been shown to be an effective means to achieve retention and recruitment of talent. This includes the development of leadership capabilities of employees which leads to an increased opportunity to recruit from within (Cenkci et al., 2019; Douglas, 2008; Katz & Miller, 2020; Schlachter et al., 2023). Managers have come to understand that ERG members provide a distinct contribution to the workplace, including the advancement of business objectives and/or fostering internal

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connections within the company (Douglas, 2008). Some research findings attribute innovative behavior to ERGs and their potential to influence workforce policies, thus supporting organizational change (Cenkci et al., 2019; Hossain et al., 2020; Katz & Miller, 2020). Others found that diversity is seen as an asset in improving sales or innovative behavior (Benschop et al., 2016; Douglas, 2008; Gotsis & Kortezi, 2013; Slooman, 2022). Singh et al. (2006) analyzed a (women) ERG that was involved in marketing and product development including the design of cars for pregnant women at Ford. Similarly, looking at data from 1996-2009, Pichler et al. (2015) empirically found that LGBTQIA+ policies benefit key financial performance factors, such as firm value, productivity, and profitability. The researchers believe that firms especially those involved in R&D activities tend to achieve better outcomes by implementing LGBT-friendly policies because they have a higher necessity in being recognized as preferred employers. In sum, there is reason to believe that ERGs create a competitive advantage and improve organizational effectiveness (Githens & Aragon, 2009).

ERG members feel more engaged with the workplace and meeting similar others which has been shown to support people's confidence to stay within an organization rather than to leave (McPhee et al., 2017). Lastly, integrating ERGs into business strategies can potentially enhance organizational outcomes and foster ongoing improvement, as suggested by Van Aken et al. (1994). Based on these organizational benefits, scholars are now articulating a need for ERGs to transform into BRGs: Business Resource Groups (Welbourne & McLaughlin, 2013).

As explained earlier, ERGs usually emerge from grassroots efforts and often transform to be institutionally recognized by the firm. ERGs undergo this transformation because being embedded within the organization includes receiving financial support and access to organizational influence (Slooman, 2022). Indeed, in Bierema's (2005) case study of a failed

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women's ERG, the researcher concludes that ERGs without organizational support are less likely to succeed.

At the same time, institutionalization may go along with strong top-down control, constraining the ways ERGs can advocate for community-based goals (Githens & Aragon, 2009; Singh et al., 2006). For example, Sloodman (2022) notes a potential constraint in that institutionally incorporated networks might need to avoid being overly critical because they might risk losing organizational support, which, however, is crucial as their success ultimately depends on commitment from the top management team (Schlachter et al., 2023). Research has not published empirically based data on how the dynamics around institutional embeddedness unfolds.

### 2.4. Inter-Relationships between Rationales and Key Actors

ERGs have initially emerged with a strong focus on justice and community-oriented concerns, but their focus has shifted to becoming more aligned with business objectives (Welbourne et al., 2015; Zheng, 2022). ERGs that originate from grassroots efforts are typically formed by employees who recognize a specific need and are often motivated by a justice-oriented goal to improve conditions for their identity group within the workplace (Friedman & Holtom, 2002).

Previous scholars argue for either a business or a social justice perspective regarding managing diversity in organizations (c.f. Ahmed, 2007; Byrd & Sparkman, 2022; Georgeac & Rattan, 2023; Johns et al., 2012; Noon, 2007; Sinclair, 2006; Tomlinson & Schwabenland, 2010; Van Dijk et al., 2012). Yet, we do not know much about how ERGs work across these differing approaches (Byrd & Sparkman, 2022), or how business-driven arguments might coexist with community goals. Scholars like Sloodman (2022) explored the tension between the business case

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and a social justice perspective, the study does not extend to examine how these tensions play out across the various levels of actions (c.f. Byrd & Sparkman, 2022; Van Dijk et al., 2012).

Barnes and Ashtiany (2003) stand out in proclaiming that the business benefits of diversity may depend on non-economic justifications being given space. For instance, individual benefits like social embeddedness, or an increased feeling of belongingness might lead to a more successful retention of employees, especially from marginalized groups (Friedman & Holtom, 2002). These findings emphasize that the value generated by ERGs might be related to more than just one rationale. It is thus plausible that a third, reconciling rationale exists that upholds the fair treatment of individuals to fulfill moral, social, or legal responsibilities while recognizing the ERG's benefits to their business, similar to the Dual Value Integration by Olsen & Martins (2012). The researchers noted that organizations view DE&I as advantageous for the business while acknowledging its intrinsic significance. A similar approach might exist for ERGs as well.

Most research on ERGs is focusing on exploring the experience of ERG members and ERG leaders (Baker, 2009; Cenkci et al., 2019; Friedman & Holtom, 2002; McFadden & Crowley-Henry, 2018; McPhee et al., 2017; Schlachter et al., 2023; Singh et al., 2006). There are two exceptions. Research on an LGBT network included a management perspective, but misses executive sponsors (Colgan & McKearney, 2012). Ratcliff (2023) includes executive sponsors alongside ERG leaders, however, only for knowledge sharing purposes. Hence, the investigation of the distinctive perspectives on ERGs, alongside the description of the executive sponsor role are another under-explored topic in ERG research.

Previous studies do not provide a comprehensive view of how stakeholders are interrelated (ERG leaders, executive sponsors, company representatives), particularly in relation to business and community goals. Schlachter et al. (2023) are a notable exception as they

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highlight the value of ERGs to ERG leaders and company decision makers. However, only interviewing ERG leaders. Research by Baker (2009) and Scully (2009) delved into the tensions ERG stakeholders experience. Specifically, Baker (2009) examined tensions across multiple levels of action. She discovered that tensions between networks and the organization were centered around issues such as purpose, resource allocation, image, operational structure, and overarching vision. However, her research has overlooked the impact of business and community goals on these tensions. The dichotomy between individual and collective interests, as well as self-interest versus the common good, has been noted (Baker, 2009; Gotsis & Kortezi, 2013). There is more research needed to learn about the similarities and differences between the perspectives of the different stakeholders.

Overall, while existing literature has pointed to some tensions within ERGs, there is a lack of systematic exploration across different levels of action and in the context of pursuing business and community goals. My thesis aims to contribute to close this gap by adding a structured perspective on the operation of ERGs, including the interrelationship between different stakeholders. Particularly the perspective and role of executive sponsors is a novel contribution. I further add to the current literature by taking community and business objectives into account, and how both rationales are intertwined and influencing each other.

The preceding sections have outlined various levels of action where ERGs operate and potentially exert influence. I have shown the role of individuals both as employees and ERG members, the ways in which the ERG benefits the community, and how the ERG is both supported and possibly constrained by the organization. The forthcoming sections will dive into the research design of the case study.

### 3. Case Study and Research Methods

The purpose of this thesis is to understand the nuances of ERGs as a tool for DE&I work with a specific focus on the rationales for attribute-centered ERGs. As discussed previously, community goals refer to objectives put forward by the ERG community to improve the condition for those identifying with the identity covered by the group. Business goals refer to positively impacting the bottom line via tangible business outcomes (Schlachter et al., 2023). Interviewees for this research project did not find the term Social Justice to accurately reflect the work of their respective ERGs within the organization. I therefore decided to focus on formulating the ERG “community case” instead.

The levels refer to layers where the operation of ERGs unfolds. This includes the individual level, the group, the workplace and the firm. Based on the relevant stakeholders associated with ERGs, along with the yet missing inter-relationship between stakeholders and rationales, this thesis explores the following overarching research question:

1. How is the operation of ERGs perceived across different levels with respect to community and business goals?

In the second step, the thesis compares the different perceptions between the three ERG stakeholders explored in step one. I discuss how the different perceptions align with one another, where synergies and frictions might arise and how potential frictions are navigated:

2. In comparing the perceptions, how do these levels interact and align with one another?
  - a. Which of these levels are in synergy?
  - b. At which intersections of these levels do frictions arise?
  - c. How do ERG leaders and decision-makers responsible for DEI initiatives navigate these frictions?

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### 3.1. Research Design & Methodology

This research adopted a qualitative case study methodology, in line with Creswell (2014). It involved an in-depth examination, limited by a predetermined time period, and incorporated a range of data collection approaches. Further details of the methodology will be provided in the upcoming sections.

The overarching methodological approach is a qualitative case study design to learn about the individual's lived experiences at their workplace. A case study is particularly apt as it allows for an in-depth exploration of how ERGs are situated in organizations (Creswell, 2014).

This section begins by outlining the rationale for the case. I will further outline the foundational epistemology and ontology and then proceed to detail the data collection processes, including the target population, sample size, and recruitment strategy.

**Case Study:** The data was collected in a firm operating within the Global Financial Services Industry. The firm employs formal structures for engaging with diversity, equity, and inclusion. This includes a Head of DEI & CSR (role first initialized around 2017), a DEI Coordinator (role created in 2023), and an ERG Coordinator (role created around 2021). The company established multiple Employee Resource Groups across its locations worldwide (eleven within the United States), with the current study narrowing its focus to three attribute-centered ERGs across their five legal U.S. entities. Specifically, I focused on the ERG for Women, People of Color, and Queer employees<sup>3</sup>.

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<sup>3</sup> To ensure the confidentiality of the company, and interviewees, all ERG names have been altered. I am aware of the debated usage of *people of color*, as it posits whiteness as neutral and the norm (Ahmed, 2023). Some interviewees have used the term PoC to refer to the target group of the ERG. Upon that, I decided to use this term to refer to the ERG and ERG leaders as I did not request interviewees to identify their race or ethnicity. For those individuals who chose to self-identify during the interviews, I may refer to their identities to provide context of their positionality within the case study.

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Due to the firm's structured approach to DE&I, as well as its strategic commitment to the cause, it presents an opportune venue for understanding the research questions. Moreover, preliminary informal conversations with ERG leaders supported the tensions and frictions that the literature has identified. The company has agreed to support this research by sharing relevant data. The research is not financially compensated by the company to mitigate ethical concerns and biases. A contractual agreement is in place to ensure the anonymity of the company and its employees, safeguarding the integrity of the research process.

**Interpretive Approach:** The research adopted an interpretive stance. As the researcher, I acknowledge that perceptions of reality are highly subjective and influenced by my own experiences and positionality, even when following approved methodological approaches. An interpretive approach differs from positivist methodologies, as the aim is not to verify a theory or establish causal relationships through statistical analysis. Instead, the aim is to contribute to a more nuanced and enriched understanding of attribute-centered ERGs in large private corporations and their influence on the manifold layers as explained previously.

**Epistemology & Ontology:** In alignment with the interpretative approach, the research methodology is supported by subjective epistemology, suggesting that knowledge is construed through individual interpretation, following Creswell (2014). Moreover, the ontological foundation of the study is based on constructivism, which posits that reality is socially constructed rather than objectively existing.

**Validity & Reliability:** I ensured the validity of my interpretations through several measures. First, I triangulated different data sources to add to the validity of my study which involved relying on different sources (interviews, observation, and documents) to build a cohesive rationale for the identified themes (Creswell, 2014; Rashid et al., 2019). Examining

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multiple data sources can corroborate the findings as the subsequent interpretation will not be limited to a single source that may be biased. Second, a cooperative research process, also known as member checking, was used to verify with the participants whether the transcription and subsequent analysis are accurate (Creswell, 2014). I conducted follow-up meetings with nearly all participants to review my analysis. Lastly, spending prolonged time in the field, which I will have done upon final submission, is another strategy to ensure validity and mitigate any biased observations. Reflecting on positionality helped mitigating biases in analyzing and interpreting data.

The reliability of the case study will be ensured following Creswell (2014). First, by checking transcripts, I ensured that no mistakes were made during the transcription phase. Secondly, the established qualitative codebook ensured that all data was continuously compared with the established codes to ensure a consistent meaning of coding.

### 3.2. Data Collection

The data collection methods consist of three approaches including document analyses, in-depth, interviews, and ERG strategy meeting observations.

#### 3.2.1. Document Analysis

To understand the background and the guidelines of ERGs within the company, I reviewed various documents, including but not limited to PowerPoints communicating the definition and usage of ERGs within the company as well as Excel Sheets outlining the ERG strategy including activities and the budget of each ERG. The purpose of examining these materials was to comprehend the setting of the ERGs, as well as their history and the firm's supporting infrastructure. The information I retrieved served as contextual information that later only proved to be partly relevant for the final analysis. The focus of the analysis lied on semi-

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structured interviews, group discussions, and observations of ERG strategy meetings and will be exemplified in the subsequent sections.

### 3.2.2. Interviews

To learn about the anticipated levels of action, the data collection regarding interviews included multiple approaches as well. The first type of semi-structured, one-to-one interviews were conducted via Zoom with ERG leaders of the three attribute-centered ERGs to learn about their perspectives. A second type of interview was conducted to learn from the firm's decision-makers who are supporting and monitoring ERGs, also via Zoom. As a first step, I had a group discussion with DE&I affiliated employees (Head of DE&I and DE&I coordinator); the second step included a one-to-one interview with the ERG coordinator. Lastly, I had a one-to-one interview with the U.S. Head of HR, whom the Head of DE&I reports to, and who ultimately decides on budget allocation and strategic questions.

**ERG Leaders:** People were qualified to participate in the study if they had been working for the company for more than a year and currently are or have been an active leader of at least one of the ERGs. The Head of DE&I kindly assisted in reaching out to ERG leaders who might be willing to speak with me, which resulted in purposefully selecting the participants (Creswell, 2014). I also used snowball sampling asking ERG leaders to connect me with further active ERG members and leaders at the end of each interview. I conducted interviews with four out of nine PoC ERG leaders, three out of seven Queer ERG leaders, and four out of six Women ERG leaders. This enabled me to capture insights from approximately half of the ERG leadership of interest.

**Executive Sponsors:** Individuals were qualified to participate in the study if they had been working for the company for more than a year and currently are or have been a sponsor of

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one ERG. I interviewed five executive sponsors, at least one per ERG. I purposefully selected the participants following a list of executive sponsors I received by the Head of DE&I (Creswell, 2014). The sample size was determined by the nature of the role. Typically, an ERG only has one Executive Sponsor, however, to account for the different legal entities, some ERGs have multiple regional executive sponsors. I conducted interviews with five of the six executive sponsors relevant to the ERGs I focused on.

**Company decision makers:** Lastly, to understand the firm's perspective, I reached out to the Head of DEI&CSR, the DEI Coordinator, and the ERG Coordinator as well as the U.S. Head of HR. The recruitment strategy included reaching out to the Head of DE&I first to get insights into which constellation of interviews makes sense given the busy schedules and thematic foci. Following her advice, I scheduled the interviews. The sample size was determined by the individuals directly involved with ERGs from a decision maker perspective.

**Sample Size:** Qualitative research is about the richness and nuances data can provide (Hennink & Kaiser, 2022). To account for the qualitative nature of the research, the study used theoretical saturation to determine the optimal sample size which is the point where gathering more data does not reveal new insights (Hennink & Kaiser, 2022; Moser & Korstjens, 2018)<sup>4</sup>. This study is responsive to the common critiques regarding the lack of transparency when reporting sample size and saturation (c.f. Carlsen and Glenton, 2011; Francis et al., 2010; Marshall et al., 2013; Vasileiou et al., 2018). Saturation was evaluated after conducting 20 one-to-one interviews, which aligns with Hennink and Kaiser's findings on sufficient saturation range (5-24). To confirm this finding, I conducted two additional interviews at a later point to check for new patterns as suggested by Moser & Korstjens (2018). As no new patterns emerged from these

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<sup>4</sup> Saturation is a concept that originated from grounded theory (Creswell, 2014). However, according to Hennink and Kaiser (2021), it is widely used and accepted in other qualitative research approaches as well.

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interviews, I determined that saturation has been reached using the "Stopping Criterion" approach (Hennink & Kaiser, 2022). I combined this with the "Code Meaning" approach to ensure a full understanding of each code is gained (ibid.).

### 3.2.3. Observations

Another type of data collection comprised strategy meeting observations to understand the group dynamics between each ERG and the representatives of the firm's decision-makers. I observed, however, did not record, one strategy meeting for each ERG which allowed me to learn about the dynamics on who is speaking, and who is listening, whether the relationship is mutually supportive or acrimonious, and whether it is based on telling vs dictating. The observations have been conducted via Microsoft Teams as this is the platform used within the company. Participant observations are characterized by an interactive experience that is relatively unstructured (Guest et al., 2013). The analysis is inherently interpretive. Concerning the target population, sample, and recruitment strategy concerning observations, I contacted the Head of DE&I, the DE&I coordinator, and the ERG Coordinator and asked for their permission to observe the meetings, which they kindly granted. The target population for this study is defined by the focus on three specific Employee Resource Groups (ERGs) and was predetermined by the individuals invited by the company which was beyond my control and in sum included 19 people, partly overlapping with people I interviewed.

### 3.3. Data Analysis

I followed an iterative approach to data analysis which is characterized by simultaneously collecting and analyzing data to allow for new patterns to emerge (c.f. Glaser & Strauss, 1967; Miles & Huberman, 1994). The one-to-one and group interviews have been analyzed following Robert Weiss (1995). First, all interviews were recorded and transcribed. Using an excerpt file,

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the data was coded, and sorted into meaning chunks dealing with a similar topic that then were consolidated to represent a story of that issue. A qualitative codebook has been compiled. By summarizing the excerpt file and the coding, they have been integrated into a report. The last step, inclusive integration, included establishing a framework building on the previous analysis, that eventually led to a general conclusion (ibid.).

The underlying theoretical framework and reasoning build upon interpretive epistemology as it leans towards a logic of abduction (Järvensivu & Törnroos, 2010). Abductive reasoning combines the logic of deduction and induction. It is characterized as a method where theoretical frameworks, empirical fieldwork, and case analysis evolve simultaneously in a systematic manner (Dubois & Gadde, 2002). It aims to explore and understand a social phenomenon through the lens of social actors (Järvensivu & Törnroos, 2010). The abduction methodology is particularly apt for conducting case studies in business research settings, as emphasized by Dubois and Gadde (2002).

The methodology of interpretation is based on hermeneutic techniques to interpret forms of human expression. Central is the hermeneutic circle, which is a dynamic process of moving between the whole and the parts whereby understanding is achieved through an iterative process.

The approach is further grounded in a dialogical understanding wherein I, as the interpreter, engaged in a dialogue with the texts and documents under analysis as well as social actions in the form of interviews to grasp the meaning.

### 4. Case Company: Situating the ERGs in the Organizational Setting

**Company Infrastructure:** As explained above, the research was conducted in a global financial services company with a focus on their five U.S. entities.<sup>5</sup> The company considers DE&I as one of its six strategic goals, which includes creating an inclusive work environment. ERGs are supported by the organization and situated within the firm's DE&I governance structure (see Figure 1). Each ERG is comprised of ERG members and has a steering committee with various roles to which people can apply when they are open: Chairperson, Secretary, and Treasurer. ERGs are free to develop their own structure beyond these guidelines. Each ERG consists of multiple regional leaders to account for the different legal entities. The company further requires an executive sponsor. Executive Sponsors typically occupy roles in the upper echelons of the firm. It is their responsibility to bridge the gap between the ERG and the company's senior leadership. The ERGs are supported by the ERG Coordinator who aligns the ERGs with one another and has regular check-ins with each group. Those roles are all voluntary and in addition to their day-to-day jobs (see Figure 1).

**ERG History:** The first ERG was launched in 2012. There are currently eleven ERGs. Ten of them were initiated bottom-up, which means that employees identified a need and initialized the ERG. This includes the ERGs this research focuses on (Women, Queer and PoC). The most recent ERG for people with disabilities, established in 2023, was the first to be initiated top-down by the current Head of DE&I. Overall, approximately 1350 employees are involved with one or more of the eleven ERGs that are open to all non-contract employees. Across all ERGs, there are 14 executive sponsors and 76 ERG leaders. Prior to 2021, each ERG operated

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<sup>5</sup> Although the company has established ERGs across its global sites, these ERGs are not yet connected with each other on a global scale, resulting in their exclusion from this research.

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through local chapters. Following the regionalization, directed by the former Head of DE&I, local chapters were merged into one ERG spanning all legal entities. The regionalization posed some challenges on the operation of ERGs which will be discussed in the subsequent section. Whereas ERGs previously all received a similar amount, a new system is now in place that ties the allocated budget to the events ERGs have planned for the upcoming year. This regionalization facilitated a more robust support mechanism for all ERGs and improved coordination within and between groups and enabled the organization to better utilize the groups.

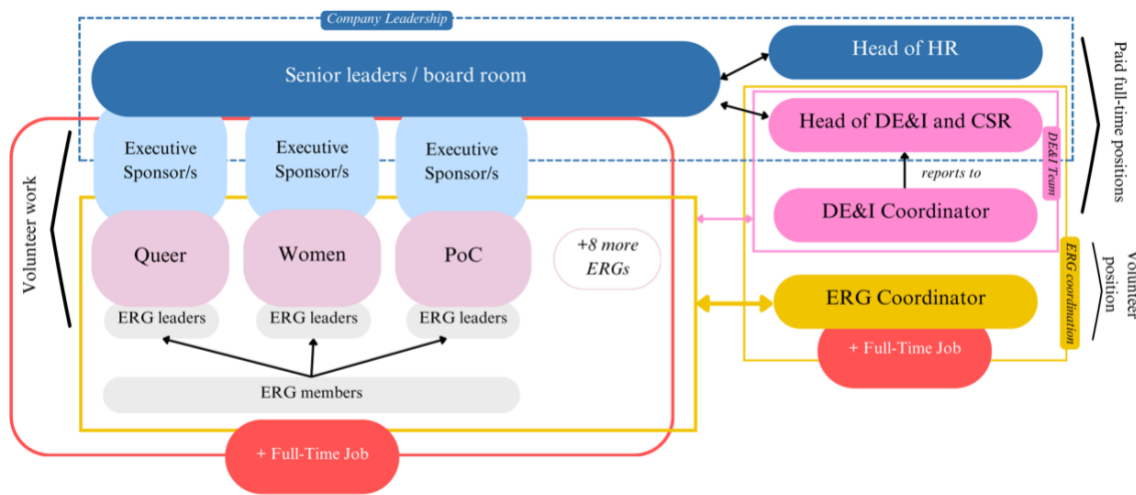


Figure 1: Overview of ERG Structure within Case Company.

**ERG Overview:** The first focal point of the ERGs was gender, which is why the Women’s ERG was the first to be initiated in 2012 at one of the five legal entities. At that time, there were no other formalized DE&I structure or roles established at either of the entities. The group was then regionalized to be open to all U.S. employees and has about 450 members. Their purpose, as stated on their intranet site is to:

Work toward creating a workplace that attracts, develops, retains, inspires, and supports female professional talent to achieve their career aspirations.

Right after the inception of the Women’s ERG, employees attempted to initialize the Queer ERG. However, they were told that it would not be well received by the former Head of

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HR. It wasn't until 2017 that employees were allowed to formally establish their group which now has approximately 300 members. Their purpose is for:

Allies and LGBTQ community members [to] work together to create an inclusive environment to help retain and attract talent, drive innovation, diversity of thought and promote understanding.

The PoC ERG initially consisted of multiple ERGs, each for different identity groups that were later consolidated in the course of the regionalization (around 2015/2016). The transition to one regional ERG helped the company to streamline the activities and budget for each. The ERG has around 380 members today. Their purpose as stated is to:

Celebrate and elevate employees of color by promoting organizational inclusion and belonging, fostering dialogue around key diversity opportunities, build strong ties in the community, and support employees of color to advance professionally.

**ERG Activities:** ERGs engage in a variety of activities many of which aim to create a safe space for fostering community and personal connections. All ERGs I studied highlight various Heritage and Diversity Months and specific observance days to raise awareness for their cause. Additionally, the Women's ERG introduced an annual award to honor women for their contributions to the company. The Women's ERG has already implemented a successful mentorship program, the PoC ERG is about to follow. The PoC ERG also organizes a Multi-Cultural Event. The Queer ERG values its listening sessions as a safer space for discussing LGBTQIA+ related topics. They also have a successful Allyship Program.

**Membership:** Membership in an ERG is open to all non-contract employees, regardless of their social identity, and includes being part of the ERG's email list and ERG-specific communication channels. ERG-specific events are open to all employees and are considered compensable time. Employees become part of the ERG in various ways: Members can sign up, leaders can apply to open positions, whereas executive sponsors are usually appointed or invited. Currently, the company struggled to clearly define the role of an executive sponsor. Most

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executive sponsors defined their role as to bridge the gap between the ERG and the company's leadership board by influencing the leadership, advocating for the ERG's objectives, removing obstacles, and raising awareness for the ERG's cause.

**Initiating an ERG:** Employees are allowed to initiate a new company-recognized ERG by filling out a form that requires them to provide information about the targeted employees, the group's mission, and goals, and how its mission will align with the company's mission. The form will then be reviewed by the DE&I-affiliated employees (see Figure 1 ERG Coordination). ERGs that aspire to receive organizational support must be committed to one or more of the following objectives: support diversity and inclusiveness, strengthen the firm's community, and support professional development and interactions. Recognized ERGs are not allowed to be formed and take position around any specific social, religious, political ideology, or department function or in opposition to another Employee Resource Group.

**ERG Accountability:** Each ERG must present their annual strategy to Head of DE&I, the DE&I Coordinator, and the ERG Coordinator (see Figure 1, ERG Coordination), outlining planned events as well as necessary budget. To ensure the ERG's adherence to budget and alignment with their strategy, the ERG Coordinator (part of the DEI council) and the DE&I Coordinator regularly hold meetings with the ERGs. ERGs are allocated a dedicated annual budget which originates the DE&I budget. The ERGs this thesis focuses on (Women, PoC, Queer) approximately receive \$10,000 per year. The company further supports and enables the success of ERGs by providing the ERGs and their leaders visibility within the firm. The company's executive leaders openly invite employees to join a group of their interest.

**ERG Transformation:** While these groups are referred to as ERGs within the firm, some ERGs developed into business-focused resource groups over time (BRGs). BRGs

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concentrate on the tangible benefits of diversity in the workplace going beyond networking activities. Some ERG leaders advocate for a shift to become an BRG. They believe it would demonstrate the use-case of ERGs across the organization beyond community building. In contrast, some company representatives prefer not to make this transition to maintain the original focus on community within these groups.

### 5. Description of Findings: Diving into the Struggle to Juggle

In this chapter, I present the findings of the in-depth interviews and group discussions with ERG leaders, company decision makers, and Executive Sponsors. As noted earlier, the literary canon on ERGs is missing a systematic understanding about multiple perceptions on the operation of ERGs across multiple levels. As discussed previously (see chapter 2), we need to learn from each perspective and their respective experiences to fully understand the value contribution of ERGs to both the community and the business. The levels include the individual (represented by the ERG leaders), the ERG as a group for its community (represented by the ERG leaders and executive sponsors), the organization (represented by the company representatives), and the workplace overall, including all employees regardless of their ERG affiliation.

I will lead with the ERG leader perspective which is consistent with the overall idea of employee resource groups. The section conveys what ERG leaders strive to do, their reported achievements, their challenges, and their aspirations. The subsequent sections will point to the perception of company representatives and the areas that are similar or different from what the ERG leaders expressed. The section concludes with the perception of Executive Sponsors as they are positioned to bridge the former two levels.

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Table 1: Summary of Stakeholder Perspectives on ERG benefit

<i>Summary of Stakeholder Perspectives on ERG benefit</i>			
<i>Perspective</i> <i>Topic</i>	<b>ERG Leaders</b>	<b>Company Decision Makers</b>	<b>Executive Sponsors</b>
Cultivating Relationships	Priority	Priority	Priority
Community Building	High Priority	Priority	High Priority
Open Dialogue	Priority	Not mentioned	Medium Priority
Sense of Safety	High Priority	Medium priority	Not explicitly mentioned
Personal Fulfillment	Medium priority	Medium priority	High Priority
Professional Development	Medium priority	Strategic Priority	Medium Priority
Awareness Raising	High Priority	Substantive	High Priority
Policy Changes	Medium priority	Medium priority	Low priority
External Recruiting	Desire for more involvement	High strategic priority	High priority
Onboarding	Desire for more involvement	High priority	High priority
Retention	Medium Priority	High strategic priority	High strategic priority
Reputation	Not substantive	Medium priority	Medium priority
Company Culture	High priority	High priority	High priority

### 5.1. ERG Leader Perspective

This section centers the perspectives of ERG leaders and details their experiences within ERGs. I will begin by discussing why people joined the ERG and what they value about them, followed by describing what ERGs aim to do for fellow colleagues, as well as characterizing the role of ERGs at the organizational level. I will summarize the support ERGs receive and challenges faced by ERG leaders in carrying out ERG activities. Table 1 summarizes the key

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aspects of the perception of ERG leaders with respect to the benefits of the ERG. Challenges included attracting new members, sustaining active participation in ERG initiatives, and addressing member burnout. In addition, the ERGs faced financial constraints, and are tasked to balance day-to-day job responsibilities alongside voluntary work for the group. I will also outline strategies employed by leaders to address these challenges. The section will commence with the ERG leader's perspective on why the company is supporting ERGs.

### **ERG leader's decision and passion to join ERGs**

Based on the experiences ERG leaders shared with me, individuals made a variety of experiences that often related to their marginalized identity and status prior to joining an ERG. Many respondents noted a lack of representation, especially women of color and white women. One PoC ERG leader, for instance, would like to see more Black employees, especially Black women, represented within the company. The ERG gave her the opportunity to meet people who look like her, which comforted her as someone who just started her career:

So, representation is definitely hard to come by, especially within our industry in general. Not just at [the company]. So, joining the ERG definitely benefited me because I was able to meet people who look like me, who had similar experiences like me, and it gave me comfort because I didn't know what to expect when joining corporate America.

Another PoC ERG member further pointed out that despite a substantial presence of Hispanic individuals in the U.S. population, their representation within the company is lacking, making her feel like a minority. For the women of color I spoke to, race has contributed significantly to their workplace experiences, for some individuals more so than gender. One individual said:

Yes, I am a woman. But what people acknowledge even further is that I'm a woman of color.

Joining an ERG for other ERG Leaders stemmed from having received support and mentorship by senior women. This sparked their passion to give back and offer similar support to

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women younger and newer in their careers. Overall, passion was the common denominator why employees join, initiate, and stay committed to the ERG work.

### **The Value of ERGs for the Individual – ERG Leaders Perspective**

Leaders of many ERGs shared personal stories as to why they are members and what they value about the ERG including the development of deep personal relationships and a community. For many ERG leaders, the groups foster an open dialogue among members and educate about workplace politics. They also contribute to an increased sense of safety, reduce work-related stress, and allow for fulfillment in various ways. ERGs also positively contribute to the professional development (c.f. table 1).

**Cultivating relationships:** Many emphasized that ERGs foster the cultivation of personal relationships among its members, an aspect highly valued by many. Leaders of several ERGs conveyed that ERGs unite people across the various U.S. locations and legal entities of the company, fostering a sense of connectivity among people who may not typically interact. As one ERG Leader pointed out:

I've been able to benefit from ERGs because I think joining such a large global company, like obviously we're all over the place. I think [ERGs] really give us an opportunity to connect with people that we didn't really even know existed.

**Community building:** ERG leaders mentioned that ERGs foster a community among individuals with similar experiences, leading to a sense of belonging among underrepresented employees. Because of the close community the ERGs represent, one ERG leader compared his experiences in the ERG to the dynamics of a family. He said:

So being a part of this ERG, we move beyond ... members. It's really creating a dynamics of family, right?

**Open dialogue:** Many ERG leaders and members value the ERG as a space for open dialogue and sharing personal and professional experiences. ERG leaders shared that they

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received communal support when sharing such experiences. For instance, one member of the PoC ERG highlighted how the ERG enables individuals to share their stories within a community that empathizes with each other. Several ERG leaders discussed that ERGs allow employee voices to be heard. As one person said:

After all everybody wants to be heard. They just want their voice heard. As one person told me, 'I don't expect you all to have answers to my problems up to what I'm dealing with. But I just feel so much better being heard'.

**Workplace politics:** The PoC ERG has given another member the ability to learn about workplace politics, and the topics that are appropriate to talk about. This resulted in an increased confidence for the ERG leader to raise concerns to the group after experiencing a situation that she did not feel comfortable with. The interviewee recalled:

But if I wasn't involved in the [ERG] leadership, I don't think I would have [done] that just as an employee. I think I would just hold that thought and not really know where to go with it and not want to be ostracized for feeling that way.

I was hesitant to talk about certain topics because I didn't know if it was appropriate for the workplace ... if I say something, is it going to be controversial or [is] someone going to take it the wrong way if I bring something up? And so [the ERG has] definitely given me the confidence and given me a space where I'm able to talk about my ideas and talk about my concerns as well.

**Sense of safety:** The community aspect fostered a sense of safety for individuals to express their authentic selves at work. Prior to the initiation of the Queer ERG, one ERG leader who identifies as a queer woman, felt uncomfortable being open about her sexual orientation and marriage to another woman while at work:

I have been with this company since 1990 (...) I was not out at work for probably ten years and we were married for 14 years.

**Stress reduction and fulfillment:** ERG leaders also emphasized that their involvement in the ERG helps alleviate the stress from their daily work and allows them to seek fulfillment in a cause greater than themselves. For example, one ERG leader feels that her participation in the ERG reduces work-related stress by fulfilling personal needs:

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Having this balance actually makes work less stressful because I feel like it's fulfilling this personal ... side of me that otherwise wouldn't be fulfilled at work.

Another leader of the Queer ERG found fulfillment because the ERG allowed her to make an impact on matters close to her heart beyond fulfilling regular job responsibilities, for instance by talking about her experiences at National Coming Out Day:

Nobody cares about ... me [doing my day-to-day responsibilities]. That's in the grand scheme of life that doesn't matter. [It] was National Coming Out Day ... and that was probably the most impactful thing I did all week – all week, five days.

ERG leaders further shared how the ERG enabled them to give back after receiving similar support. This involved empowering employees and offering support for those at earlier stages of their careers. A member of the women's ERG seeks to contribute to the success of other women in the company by supporting those who are in a position she once was in:

I also wanna see other women succeed and [I want to] pull up other women who were like myself in my mid-twenties.

**Professional development:** Interviewees also purport that ERGs significantly contributed to their professional development. Through networking, skill-building, and early leadership opportunities within an ERG, many individuals were able to advance their career. For example, members of the Women's ERG acknowledged that the ERG and its networking activities and programming contributed to their ability to secure new employment opportunities. One leader in specific focused on empowering and supporting other women throughout their professional journeys, aiming to have a lasting impact. This inspired her to join and be active in the group:

The opportunity to hopefully make a difference for women younger than me or newer in their career ... [and] to do something that maybe will have a lasting impact, ... facilitate career development, personal development... for people coming behind me.

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New job opportunities have also been awarded to one PoC ERG member who credits her current position to a recommendation from another ERG member who had received a promotion and identified the ERG colleague as suitable for the open role.

### **The value of ERGs for the Workplace & Community – ERG Leader Perspective**

**Awareness raising:** ERG members and leaders not only receive support and guidance within the groups but also extend their influence by raising awareness among those not directly involved. They achieve this by building allyship, organizing events, commemorating diversity days, and empowering the ERG leaders and members to become a point of contact for non-members.

One aspect of raising awareness is building allyship. One PoC ERG member highlighted that allyship was built via educational events. She emphasized the importance of including allies to understand experiences they may not personally encounter. She believes that the ERGs must “change from monologue to dialog,” hence opening the conversations for everyone to join:

When it comes to subtle acts of exclusion or bias that I experience that you may not even know about ... It's not that you don't care, you just don't experience it ... without having allies and minorities in the room together to have that conversation, you can never have a level of understanding. It just kind of creates a barrier.

Another PoC ERG leader found that the ERG increased in strength because the more people are dedicated to the issue, the more awareness an ERG can raise. ERG leaders of the Queer ERG noticed an increase in non-members approaching them for advice particularly after emphasizing allyship in recent years. Allies often include parents seeking guidance after family members came out as queer. One ERG leader shared her experiences of having fellow colleagues asking for her advice:

We've been very careful to put that focus and emphasis on allies, and ... what it's opened us up to in the last, I'd say 4 or 5 years is [for example]: ‘My child is trans. My niece is now my nephew. How do I address this and my mom's now living with me. How do I tell her that her grandchild is now Tim?’

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Another ERG Leader and ally of the Queer ERG educated a fellow colleague who made assumptions about her being queer after attending the initial kick-off meeting of the ERG:

I actually had somebody approach me afterwards and be like, ‘I didn't know you were gay’ and I'm like ‘it's called being an ally. That's with the A [in LGBTQIA+] stands for, you know’.

A second aspect of raising awareness all ERGs undertake is observing Heritage Months and commemorating significant days. One ERG leader highlighted the impact of observing the Trans Day of Remembrance within the organization as an effective method for reaching individuals about LGBTQIA+ related topics. Moreover, the Queer ERG is hosting educational events such as speaker series or listening sessions focused on LGBTQIA+ issues which were well-attended and well-received by employees. The PoC ERG, for instance, shares resources during Black History Month to raise awareness within the organization. The Women's ERG organized an award program recognizing women’s contributions within the company.

As a final aspect of raising awareness, some ERG leaders became informal points of contact for those outside the ERG because of their affiliation with the group. This was particularly the case for Queer ERG leaders. One ERG leader was approached by colleagues regarding LGBTQIA-related questions due to her active membership as an ally:

Because of my involvement in the [Queer] ERG, I have been a safe space for people to come to. I had a co-worker ... come to me and share with me rather emotionally that their child had just come out to them and just wanted to get my ... viewpoint and my opinion, and how I handle and navigated certain things.

**Advocating for policy changes:** ERGs further support their members and leaders by advocating for policy changes. The Women’s ERG was successful in advocating for changes to a U.S.-level return-to-work policy that was introduced post-Covid. The Queer ERG has been effective in instigating multiple changes. One ERG leader highlighted the new ability for employees to add their pronouns to their Teams profile. Another ERG leader was proactive about

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policy changes and is now proud to have been part of revising the global policy to incorporate LGBTQIA+-inclusive language into various policies ranging from global donations guidelines, health benefits, to modifying the relocation policy that now encompasses one's household instead of legal spouses or children. They also advocated to implement gender-neutral bathrooms in office locations. To achieve this, the ERG closely collaborated with the benefits department. These guidelines positively benefit all employees, irrespective of their ERG affiliation.

### **The Value of ERGs for HR Practices– according to ERG Leader perception**

ERGs also add value at the firm level by contributing to the recruitment, onboarding, and retention of employees. They also positively influenced the image of the firm, as well as the workplace culture.

**Recruiting:** While ERG leaders acknowledged the positive influence of ERGs in recruitment efforts, many express a desire for more active and public engagement in attracting employees through recruiting fairs or national organizations. One member from the Women ERG, for instance, believes that a more active recruitment approach would be beneficial for the company and the ERG.

**Onboarding:** ERG members shared that they saw an increased effort of raising awareness for ERGs during the onboarding process of new employees and many believe that the company will not be able to attract or retain talent without ERGs. One member of the Queer ERG explained:

I think you won't attract or retain talent without ERGs.

The person elaborated:

A company that doesn't have anything about DE&I is going to be the outlier. It's gonna be the one that people look at and go: Why don't you have anything on DE&I on your website? Why do you not have ERGs? [Applicants] go look at [company] websites, and

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to not have anything on DEI, or not have any ERGs, that's not an environment necessarily that people want to be in.

At the same time, ERG leaders wish they and the ERGs were more actively involved in the process. One interviewee would like to see ERG leaders involved as an advisory board concerning talent acquisition and onboarding:

I think they've done a better job now during the onboarding process of making people aware... But I think it would be great to even involve ERG leaders in whether it's a discussion of talent acquisition, or onboarding ... and really get input and allow us to act as an advisory board.

Another ERG leader of the Women's ERG proposed to place each new hire with an ERG member which she believes would positively contribute to the retention of employees:

I think it would be great to really find a way to elevate some of the newcomers into the company into [ERGs] so that they can also develop themselves and network and the more ingrained they are in the ERGs ... they probably are more likely to stay with the company if they find that there's ... meaning, or... impact within the culture and not just their day to day job.

**Retention:** Historically, the company had an excellent employee retention, as many employees stay at the firm for over thirty years as interviewees pointed out. Many ERG leaders believe that ERGs play a crucial role in retaining employees. One individual sees a particular positive influence for underrepresented ERG leaders and members, partly due to the community aspect mentioned previously:

I would say, especially for those that are involved... on the leadership teams for the employee resource groups, I 100% see a benefit in retention. I think they're more engaged with the company. They really feel empowered that they can drive change in the company, and it just leads to typically that personnel lasting longer within the company, because you don't feel like you're the only one that looks like you.

**Reputation:** ERG leaders believe that ERGs contribute to the reputation of the company, for instance by winning renowned awards. At the same time, ERG leaders expressed feeling like the firm support at times is merely symbolic:

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I think [the company] has definitely made strides in diversity and inclusion and equity. But at times it may feel like it's just a check box.

I think that they like to point to us, the Women's Network, [the Queer, the PoC ERG] ... feeling like they check all the boxes.

**Company culture:** ERG leaders expressed that ERGs help build a company culture across the various entities and locations throughout the U.S. and contributed to an understanding of what inclusion means for the company. This is twofold: First, it signifies the inclusion of all employees across all entities and offices in the United States, as employees are spread across the country as discussed previously. Second, inclusion entails building a workplace where everyone feels welcomed. As one ERG leader pointed out:

We all work at different companies. It is very hard to build a culture with different entities. And I think employee resource groups are a great way to do that.

ERG leaders further influence the workplace culture beyond their day-to-day job. This includes fostering an inclusive culture for marginalized employees and influencing discussions about what is appropriate to discuss in the workplace. For example, one Queer ERG leader who has been with the company for over twenty years mentioned a significant shift in the workplace concerning LGBTQIA+ topics. The workplace has transformed since she first joined, with discussions now including trans issues. Due to the awareness raised by ERGs, she observed a positive influence on the work culture regarding inappropriate comments. She said:

What ERGs do is raise awareness ... So, it's not okay to make a gay joke, to make a fat joke, to make an anti-semitic, to make anything. No matter what the room you're in looks like at the moment, that is unacceptable. It has no place, has no place in life but it certainly – let's make it clear – it has no place at work. So, without the ERG, I don't know if that would ever have happened. I do think there's still a whole ... Boys Club, rich and white men. It exists.

Due to such conversations, the ERG eventually allowed her, as a queer employee, to become more comfortable:

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The ERG and the focus on the DEI have allowed... to truly be your authentic self at work. Without the ERG and the focus on them and the work that we've all done across the board, I think I still probably wouldn't ever joke about having two ex-husbands and an ex-wife.

This sentiment is echoed by other ERG leaders as well, one of whom believes that as people feel more comfortable bringing their authentic selves to the workplace, they become higher performers as they no longer need to hide themselves. Despite these initiatives to influence the work environment, one member shared that disparate workplace norms persist. As a person of color, the individual is unsure whether the same rules concerning the dress code apply to them in the same manner as they do for others:

I was invited to a leadership meeting and [the invitation said] "casual". Well for me does that really apply showing up casual? ... Or will I be talked about? Will there be a separate group that says, how dare you show up like this? ... There's still that certain apprehension that ... this doesn't really apply to me. I still can't do what others do and not be seen differently.

### **Support & Challenges – according to ERG Leader Perception**

As ERGs are embedded within the company structure, they are backed by numerous support mechanisms provided by the organization including budget, time, visibility, and invitation. The structure that is meant to support ERGs seems to simultaneously constrain the groups due to limited resources. ERG leaders expressed that receiving organizational support for ERGs is essential for ERG success. For them, organizational support demonstrates the importance of ERGs to the firm and signifies to members that their work is valued.

**Financial support:** As explained in the section on Case Company: Situating the ERGs in the Organizational Setting, ERGs are supported with an annual budget. However, the amount awarded seems to present a constraint. ERG leaders mentioned that the small budget continues to be a frustration for many as it impacts the number and range of activities ERGs can pursue. For instance, one member from the women's ERG expressed frustration over the inability to fund

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events they find important while another member pointed out that with the current budget, ERGs cannot sustainably influence the company's success. Another member stresses:

[But] I think we can only do so much with the funds we're given and the visibility that we're given. And unless that changes ... we're always gonna be stuck in this club type atmosphere.

She went on elaborating:

I think we can start to do [ERGs] really well if just ...more finances are given, and ... more like resources ...more buy-in from senior leaders if they really spend the time to talk to leaders within the ERGs.

**Company representative support:** The presence of company representatives at ERG events has been mentioned as a vital support mechanism and ERG leaders expressed a desire for an increased leadership participation at ERG events. Such presence emphasizes the importance of ERGs to the company's leadership. A lack of senior leadership support and presence caused frustration for ERG leaders:

When you're running an organization and you're ... saying that [ERGs are] important to you, then you have to spend the time making it important.

**Time;** ERG meetings are allowed during work hours, which is another support for the ERG. However, time is perceived as a constraint by many ERG leaders. They expressed that balancing their day-to-day job with their ERG commitment remains a challenge, particularly ensuring that "it's not one or the other," as one ERG member pointed out. Almost everyone mentioned demanding day-jobs and constantly having to juggle multiple demands. Individuals mentioned that their day jobs will always take priority over ERG work. ERG leaders shared how their focus must remain on their main job duties first:

My plate is – I need 2 plates. My plate is so full, and I just cannot justify stepping away from all of these things I really have to do.

For others ERG leaders time constraints meant having to decline an offer to become co-lead of an ERG, while another ERG leader had to resign from an ERG leadership role due to

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juggling several responsibilities. Though time constraints can be frustrating, ERG leaders understand that balancing ERG work and a day job is the modus operandi that occasionally requires to work on ERG tasks after official work hours. A notable exception is one PoC ERG Leader, who significantly values the ability to influence someone's life through the ERG, despite his demanding role:

Yes, I am busy in my day-to-day job, but the ability that the ERG gives me to make a difference for somebody else is so significant and important to me.

Others observed that the need to balance a paid job with volunteer ERG work, often along with additional responsibilities, led to burnout. ERG Leaders mentioned that burnout originated the repetitiveness of tasks, a lack of impact, and a decline in membership activity. The latter led to an increase of work to be done by the leadership team. However, as ERG leaders noticed, the success of ERG activities depends on the availability and capacity of the people involved.

**Attract members & sustain commitment:** Another challenge that ERG leaders referenced was the struggle to sustain commitment to the ERG and attract new members. Almost all ERG leaders referred to their passion for the ERG and its cause as the main motivator for their engagement. As ERG leaders must balance work and volunteer time, one indicated that their commitment “ebbs and flows.” Another ERG leader has seen how commitment aligns with business cycles. During periods of high workload, there is only limited time available for involvement in ERG activities. However, following this intense period and particularly after bonus payments, employees are more motivated and have greater availability to engage with ERGs. One ERG leader mentioned having co-leads helps navigating the cyclic nature of ERG work. Some ERG leaders noted an overall decline in member commitment due to COVID-19 which caused frustrations. The ERG leader responsible for planning the Pride Parade mentioned that only five people showed up, which “was very depleting” for her. This decline in

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membership also made it impossible for the ERG leader to step down from her leadership role because she wasn't able to identify a suitable successor.

**Manager support:** Multiple ERG leaders pointed to the need for managerial support for ERG commitment. Though the ERG leaders I interviewed mostly mentioned supportive managers, they recognized its potential negative impact on ERG membership. One interviewee shared that the customer care department faced limitations in participating in ERG-related activities due to restrictions imposed by their managers. The ERG leader mentioned that employees cannot step away from their desks as the staffing model in the department doesn't allow for it. Another ERG leader articulates the frustration experienced by many:

It's a challenge, and it stinks because it comes down to: If your manager is supportive, then you can do it [become part of an ERG]. If your manager is not supportive, ... it potentially could be so miserable that the bottom line is 'I'm not going to lose my job over something I want to do', right? So, the emphasis again, the primary goal is to make money and support the business.

Yet another leader shared a scenario where an employee left the company because their manager did not allow them to join an ERG. Attracting new ERG members thus represents a challenge. As ERG leaders mentioned, this seems to particularly affect the Women and Queer ERG. However, recruiting new members is seen as the solution for maintaining engagement and introducing fresh ideas. One PoC ERG Leader suggests that variety and change can help current members stay motivated and excited. While an influx in membership might address issues like burnout, another ERG leader pointed out that new team dynamics can lead to a separate issue, the "struggle to get a whole new group working together," as changes in ERG leadership necessitate a period of adjustment.

**Lack of acknowledgement:** ERG leaders further mentioned a lack of acknowledgement and recognition for their commitment to the ERGs. Their work has led the organization to win renowned awards, but ERG leaders felt uncertain about how much their contributions are valued.

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Many commented on the demanding work required of ERG leadership. A Queer ERG Leader emphasized that ERG leaders are “going above and beyond ... Not everybody needs to do that. Not everybody does.” As ERG leaders are exceeding expectations, many wish to receive more recognition for their work from company representatives.

**Autonomy:** Leaders further noted constraints to their autonomy stemming from expectations of firm alignment, and legal and political limitations. Some ERG leaders noted that their groups have become more aligned with company objectives over time. From initially hosting cocktails hours, the Queer ERG transitioned to organizing workshops and influencing company policies. One member noted that the group is most successful in making progress when they can demonstrate the business reason behind their goals. Another ERG Leader observed that the ERG is tasked to balance between positively impacting the business while supporting its members:

How do we have actual effect for the business and really just supporting the community and allies as people?

Two Leaders of the Women ERG still feel like they sit in a “club atmosphere” by organizing trivia nights. While they don’t view this approach as a detriment, they aspire to leverage the ERG to influence the company’s financial growth. Similarly, a former leader of the PoC ERG mentioned a potential area of growth by linking the ERG to the business via product development. At the same time, another ERG leader remarked, it's crucial for individuals to feel comfortable in their workspace to fully dedicate themselves to their daily tasks, which then indirectly benefits the organization:

If I wasn't supported, I wouldn't want to work for the company. I wouldn't want to show up every day and give myself to an ERG or even give myself to my day-by-day job.

As explained earlier, ERGs must present the planned activities and the corresponding budget, which might pose another limitation on their autonomy.

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Lastly, ERG leaders observed limitations to their autonomy by a top-down decision to regionalize the groups as explained previously. Leaders of the women's ERG shared that they "were very much like fighting that regionalization," due to the strong connections their local chapter developed. Still, many ERG leaders appreciate the more structured approach and support structure around ERGs which improved since then. The PoC ERG was particularly affected as multiple once separate groups were merged into one big ERG, focusing on all people of color. ERG Leaders shared how that might lead to oversimplifying identities because the ERG lacks the resources to focus on all identities at the same time.

**Legal and political boundaries:** The activities ERGs can pursue and their ability to enact change within the company are further constrained by legal and political boundaries. When advocating for the ERG community within the workplace, a local chapter of the PoC ERG was once told to delete the group's LinkedIn profile and the Queer ERG encountered comparable constraints as their activities are restricted to educational purposes. One ERG Leader noted:

We can't do anything political. So, a lot of – at least for the [Queer] ERG – things that would be topical would be proposed impending legislation in the U.S. States and while we can learn about it, we can do informational sessions, we can't do anything substantive.

**Communication approach:** Closely related is the content of ERG communication. Members noted how they occasionally avoid being overly critical. Leaders from all ERGs feel like they need to be mindful about the type of issues ERGs raise and how they approach them. A leader of the Queer ERG noted that there is a "certain hesitation to be seen as too radical," but she never observed that the ERG was being refused something they wished to pursue. Similarly, another member of the PoC ERG never encountered any problems, as the PoC ERG only shares educational information:

I haven't run into any issues just because I don't think that we've shared anything that would be a hindrance to the company.

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A leader of the Queer ERG expressed how she always speaks her mind on the best path forward but refrains from “railing against the machine.” In contrast, a member of the Women’s ERG feels like they need to refrain from addressing “real issues,” such as how legislative rulings impact women:

It gets a little bit harder when we try to talk about real issues, cause there's only so much corporately that we're allowed to do within the company.

Most ERG leaders content with these challenges by persistently advocating for issues important to them. One member of the PoC ERG said that they “need to continue to push.” Another member of that ERG emphasized that even when progress appears stagnant, particularly for people of color, ceasing the effort will not yield any change either. As the person said:

When it comes to people of color, we feel like we've been dealing with this struggle for so long and that things will never change. [However,] ‘if you sit back and be quiet, rest assured nothing will ever happen’. We must continuously bring forth the issues that are important to us and be firm but respectful in doing so.

We must have the ability to persevere. And I love that word persevere because it means to continue in spite of great difficulty, pain, and hardship.

**Backlash:** One leader of the Queer ERG shared that when she changed her Teams background to reflect the Pride Month celebration organized by the group, a former colleague seemed irritated and questioned whether this would now be necessary for every month. She quoted him as saying:

Well, then we have to do that every month. We have to do that for everything. We do it for when we have to –

The ERG leader then interrupted the person and said:

Excuse me. I'm not asking you to change [the background] to a peanut butter jelly sandwich on national peanut butter jelly day.

### **The impetus for organizational support – ERG Leader Perception**

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**People aspect:** ERG leaders offered many reasons for why the company supports ERGs. Some ERG leaders believe it reflects the company's care for its employees and their culture, recognizing the employee's contribution to business success.

**Business values:** Others view it as a strategic move to promote the company externally and attract desired talent. One ERG leader points out that in exchange for the financial support the company offers, it gains the opportunity to promote the ERGs. The ERG leader further expressed that the company's support stems from business rather than charitable motives:

It's like an equal ROI, right? You put this money into your ERGs and then you get all of this benefit from promoting the fact that you have ERGs or for saying, we can post that externally so that ...we attract the talent that we want. So that's the bottom line ... They're not going to do it altruistically. It's not because it's the right thing to do.

Overall, ERG leaders perceive the company's support towards ERGs and its commitment to DE&I as genuine, driven by a desire for meaningful change rather than just lip service. They believe that if the company didn't genuinely value these initiatives, it wouldn't offer its support.

Among all ERG-affiliated stakeholders, ERG leaders play a pivotal role in contributing to and reconciling community needs and business imperatives. ERGs support its members and leaders by building a community that provides a safe space for its members. They also raise awareness to the causes important to the community, aimed at positively changing the company culture around them. ERGs further contribute to business goals by supporting the retention of ERG leaders and positively influencing the company reputation by winning awards.

ERG leaders recognize the support mechanisms provided by the organization are vital for ERGs to be active and effect changes. However, ERG leaders also find there are not sufficient resources. Thus, the very mechanisms meant to support ERGs may at times constrain both the groups and their leaders. ERG leaders acknowledge their potential for effecting organizational change, yet some expressed a desire for more resources to maximize impact on business goals.

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Furthermore, some ERG leaders underscore the primary focus on supporting employees inherent in the term "employee resource groups," emphasizing that by prioritizing employee well-being, ERGs ultimately contribute to the success of the business. As one ERG leaders said:

As long as you create that comfortable space...for somebody at work, then I think that makes all the worlds difference to drive the business along.

Nonetheless, striking a balance between delivering business value and caring for employees remains an ongoing task for ERG leaders.

### 5.2. Decision Makers Perspective

In this section I describe the firm decision maker perspective. These perspectives include the DE&I team, consisting of the Head of DE&I, and the DE&I Coordinator, as well as the ERG Coordinator, and the U.S. Head of HR (see Figure 1). This section will illuminate the areas where the decision maker perspectives align or possibly deviate from the ERG leader's perception. Table 1 summarizes the perspective of the company's decision makers on the benefits of ERGs.

#### **The Value of ERGs for ERG Leaders – Decision Makers Perception**

With respect to what ERG leaders mentioned, the company is aware that employees need a strong internal support mechanism, and according to decision makers, ERGs provide just that.

**Relationship building:** All decision makers support the sentiments shared by ERG leaders that such groups facilitate relationship building. The Head of DE&I, for instance, pointed out that it allows employees to get connected to "their" people in the company. Official company documents also state that one goal of ERGs is to "assist colleagues to build relationships with individuals outside of their regular work groups."

**Community building:** Decision makers share the view of ERG leaders that ERGs provide a community. The Head of HR mentioned that from a company point of view, they

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wanted to ensure employees found a supportive community. He further added that having a community might positively contribute to employee's mental health:

[We wanted] to make sure people knew that there was a community that supported them. To make sure people knew that there were people like them at the company.

**Sense of safety:** The company is aware that the ERG is a safe space for some employees because the ERG brings people together that can support each other. The DE&I Coordinator emphasized the ERG Leader perception:

[We're] acknowledging that this is a safe space that [ERG members] can share, that they can be open, that there are people who care about them, who care about what their journey has looked like, and then ... who care about making sure that future journeys look different.

**Professional development:** As explained above, ERG leaders found that ERGs supported them in their career advancement. All company decision makers observed that as well and added that they strategically utilize ERGs for that. Because of the network the ERG provides, ERG members/leaders can find new jobs. The DE&I coordinator emphasized the point made earlier by one ERG leader who found a new job:

It really allows [ERG members] to broaden that work network and build a relationship with people outside of ... the business. But then it definitely contributes to the business. ... If there's a new position or team opening, you have that relationship. So that definitely helps them as individuals.

The Head of HR mentioned that the company is leveraging ERGs to foster internal talent development:

We certainly try to use ... the ERG leadership as a development tool as well. So, looking at opportunities and making sure we're bringing talents in the pipeline and giving them leadership opportunity, and ERGs (...) are all really valuable to help with that career path as well.

### **The value of ERGs for the Workplace– Decision Makers Perception**

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**Inclusive workplace:** Decision makers align with the perspectives of ERG leaders regarding the role ERGs played in cultivating a more inclusive workplace. The Head of DE&I, for instance, pointed out that the initial intention of ERGs was to build an inclusive culture:

[ERGs] were started to help build a culture of inclusion. And if we make it all about the bottom line, then it may take away some of that initial intention.

**Awareness raising:** As per the leaders of ERGs, also decision-makers acknowledged that ERGs have an impact in increasing awareness through employee education. The Head of DE&I emphasized how ERGs raise awareness about specific diversity factors. The Head of H&R highlighted a change in conversations and consciousness surrounding Juneteenth.

**Policy revisions:** One specific decision maker agrees with the ERG leaders regarding policy revisions. While I was observing a strategy meeting of one ERG, the Head of DE&I acknowledged the valuable contribution of the Queer ERG to policy revisions.

### **The Value of ERGs for HR Practices– Decision Makers Perception**

**Attraction and retention:** According to internal documents, ERGs provide value by enhancing the attraction and retention efforts of the company, which ERG leaders noted as well. Decision makers further emphasized how ERGs support the company's goal of building and diversifying the talent pipeline. The ERG's impact on talent acquisition has been "gigantic," as the Head of HR emphasized. He shared how the company utilized ERGs as a resource at career fairs and pointed to the group's influence on the company's interview process:

ERGs had a voice in ... how we go about the interview process, and making sure we have both diverse interviewees and diverse interviewers ... our goal would be to do it for every role. But we made it a requirement for senior roles. You know, at a management level and higher, it has to happen that way.

This perception is partly in contrast with ERG leaders who wished for a more active involvement of ERGs in the attraction of new employees and feel like they are not involved enough.

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**Onboarding:** Similar to what ERG leaders noted, also the Head of DE&I acknowledged the need for revisions in this process, particularly to include more information about ERGs. She noted that “[Employees] want to find that home,” however, need more information to be able to find it.

**Development and retention:** As explained above, the company utilizes ERGs for talent development, promoting career progression for their members and leaders as well as building a pipeline of future leaders for the company. The Head of HR mentioned that they have not been able to directly measure the impact of ERGs on retention. However, for him, the positive effects are evident particularly for ERG leaders. The Head of HR pointed out that ERGs are closely aligned with the HR department, as there are several ways the company is utilizing the ERGs. He sums the value of ERGs up:

A strong ERG brings people in the door, keeps them here and helps develop them and [helps] see those career paths and see the ability to bring future leaders in, to continue to help ... built a really good base from within.

It's before you get to the company. It's onboarding to the company. And then just that support network while you're at the company, I think, is critical. So yeah, from a talent perspective, that's where we really come at it from the HR side.

The ERG coordinator shared that ERGs have continuously proven their value to the organization:

I think that the ... volunteer work that [ERG members and leaders] do has proven year after year to be impactful and necessary to the organization on various levels in terms of culture, in terms of inclusiveness, in terms of ... [the] empowerment of associates.

### **Support & Challenges – Decision Makers Perception**

**Visibility & representation:** As ERG leaders pointed out, decision makers encourage employee participation in ERGs. They also provide support via company leadership representation at ERG events. This seems to be particularly representative of the company's support of ERGs, as the Head of HR emphasized:

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When we talk about [the company's] support, we're really talking about the senior representation. So, to have somebody in that room who is part of [ERGs] and passionate about it really helps get the point across and the understanding of why it's so important.

While ERG leaders agreed that representation at ERG events is vital, they do not believe that the current representation of company executives is sufficient. Decision makers, however, noted that the number of events organized by each ERG presents a challenge for senior leaders to attend because their demanding schedules. The Head of HR noted how company leaders approach him, expressing concerns about the external perception when they can only attend some of these events. They worry that it might negatively impact their image, such as a lack of support for the ERG's cause. The Head of HR explained:

Each ERG is doing so many things ... I could make like a full-time job just going to ERG events.

The visibility ERG leaders themselves receive was mentioned as another advantage of ERG involvement. According to decision makers, ERG leaders often gain more exposure to senior management, potentially tying back to benefits in career progression. ERG leaders did not express anything related.

**Attract members & sustain commitment:** In line with ERG leaders, also decision makers noted that attracting ERG members remains a challenge for ERGs. In addition, succession planning, hence identifying individuals who would like to transfer into ERG leadership roles, is a challenge identified by decision makers. They thus emphasize sentiments shared from ERG leaders.

**Time:** As explained above, many ERG leaders experience time constraints, which decision makers recognized. Overall, decision makers I spoke to believe that it's mostly a matter of balancing one's time. The Head of DE&I pointed out that the company is aware that balancing main job duties and ERG work remains a struggle at times:

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People are so busy with their day-to-day work, and no matter how much they wanna be involved. This is in addition to ... their day-to-day work, and so sometimes they find it hard to balance.

She then emphasized that everyone involved with ERGs is aware that day-to-day job responsibilities will always take priority over ERG work:

Everybody knows that at the end of the day your main job comes first, while at the same time ... managers are encouraged to give support.

**Recognition:** The Head of DE&I is aware that ERG leaders might not feel sufficiently acknowledged. She recognized that they “work really hard,” and she started to make it a habit to express that more frequently. The ERG Coordinator emphasized that lack of recognition. According to her, ERG leaders seek something in return due to their significant contribution towards winning awards for the company. She said:

If I wanted to volunteer and go through all these challenges. I could go do Girl Scouts.

She went on:

It's hard for others to be unrewarded volunteers ... because how long am I going to put up this fight without anything in return?

**Communication approach:** ERG leaders encountered obstacles when trying to communicate publicly. The Head of HR acknowledged that employees wish for the company to address topics quicker than the company can provide:

There's a desire from the employee base and specifically people engaged in the ERG for a company to be a lot more vocal and to be a lot more timely with communications.

This is why the Head of HR pointed to the company's approach to leverage the resource aspect of Employee Resource Groups, both for the organization and employees. For instance, by utilizing the groups after significant societal incidents such as shootings as a resource. One aspect involved pointing towards the ERGs as a space for employees to find comfort. Another aspect relates to communication. Especially in a global company with specific rubrics regarding

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the appropriate timing for public outreach, the Head of HR explained that it often takes time for the company to release public statements. He said:

And that's why we love to kind of position the ERGs that way ... Maybe the ERGs can act quicker and put something out that is not dependent on the company process, because they're not speaking on behalf of the [company].

**Autonomy:** ERG leaders noted that the groups have become more aligned with the business. Company decision makers supported this sentiment in their statements. The Head of HR mentioned that ERGs are aligned with the HR department, and the company's strategic goals overall:

I don't think the ERGs are doing things that are out of step with our overall strategic goals.

The ERG Coordinator further supported this claim:

In the beginning ...the focus was networking. It was on volunteerism. Now, I think that the ERGs are definitely focused on, 'how do we impact the business more? How do we educate the business more?'

**Manager support:** A lack of managerial support was mentioned by many ERG leaders, which company decision makers are aware of. Some managers are not in favor of their employees joining ERGs while others believe that their employees are too actively engaged in the groups. The Head of HR said:

We have very good support from management across the group to know that [employees] carving out that time for very valuable reasons. But I wouldn't say we have 100% unanimous support for managers ... we do run into situations where a manager is not supportive of their person being engaged, or they think their person is too engaged, and they wanna scale it back.

Overall, company decision makers believe that the ERGs receive sound company support. The ERG Coordinator finds that more resources are needed overall to better support ERGs in terms of their organization and programming:

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I think the company needs more DE&I resources. I don't think that we need a team of 25, but would a team of 5 be impactful? Yes. Could ERGs be better supported, and ... better organized and programmed? Absolutely.

**Backlash:** Company decision makers noted an initial resistance to ERGs, with questions about how siloed ERGs would contribute to inclusivity. However, the Head of HR and Head of DE&I believe in the benefits of this approach:

But there are just things that are so important to stress within each of those ERGs that we don't want to lose sight of that just by blending it all together.

Being silo serves a purpose as well. We want people to feel like they can speak up freely ... and not feel that ... they can't be themselves.

### **The impetus for organizational support – Decision Maker's Perception**

The reason why the company supports ERGs is manifold and can be attributed to external and internal factors. Consistent with what ERG leaders have observed, the firm made a public commitment to DE&I, for which ERGs serve as a practical demonstration. The Head of HR pointed out:

The ERGs are a great tool for us to kind of put our money where our mouth is when it comes to DE&I.

**Talent drain:** The company recognizes their employees as their “key asset,” as the Head of HR emphasized. He further points out that the industry and company are facing a talent drain as well as an ageing and soon retiring employee base, which necessitates the organization to hire new talent. The company is leveraging ERGs to recruit new talent as well as developing talent internally. Decision makers further acknowledged the importance of having voice and representation, along with a community that supports employees more “than a faceless, nameless big company (...) could in some respect,” as the Head of HR pointed out.

**Societal shifts:** External factors impacted the organization to focus on prioritizing its DE&I goals. This heightened prioritization was accompanied by an increased allocation of

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resources, resulting in an enhanced visibility and strength of the ERG within the company.

Nonetheless, the ERG Coordinator expressed disappointment over the fact that the organization only started prioritizing DE&I and ERGs after external influences required them to do so:

Which is frustrating for me, especially as a Black woman ... [because] these things have been going on for years ... sometimes it just feels a little late.

Company representatives recognize ERGs as integral to achieving community goals, facilitating relationship-building and fostering a supportive environment for employees to express their authentic selves. They highlight the ERGs' role in promoting workplace inclusivity through awareness-raising initiatives, while also witnessing a shift where ERGs increasingly impact the organization's financial performance. Moreover, company representatives leverage ERGs as a public demonstration of their commitment to DE&I. ERGs contribute to business objectives by attracting and developing talent, cultivating a diverse leadership pipeline, and retaining key personnel, particularly those in ERG leadership roles. Overall, ERGs are seen as instrumental in supporting employees and driving organizational success.

Company decision makers find that ERGs should prioritize serving their communities. They thus refrain from renaming ERGs into BRGs believing the transition might detract their goal of fostering a community and safe space. Additionally, decision makers stress that employees' primary job responsibilities must remain the priority. As one decision maker articulated, it is balancing both the community needs while providing value back to the business.

### 5.3. Executive Sponsors Perspective

In this section I describe the Executive Sponsors' perception. As they are not as intuitive to comprehend, I will first describe their role within the ERG. I will then resume to describe the areas where Executive Sponsors align or potentially deviate from the ERG leader's perspective.

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Table 1 summarizes the perspective of Executive Sponsors on the benefits of ERGs, comparing their perspective with those of ERG leaders and company decision makers.

Executive Sponsors are situated in the upper echelons of the company's hierarchy. From the perspective of Executive Sponsors, they remove barriers for ERG success and bridge the gap between the ERG's interest and the company's interests.

Several executive sponsors mentioned hurdles they had to overcome during their early career stages. Serving as an executive sponsor allows them to pass on advice and guidance, ensuring that individuals starting their careers don't experience similar issues. Two women of color shared unpleasant experiences from their professional journeys, motivating them to contribute to creating a workplace where others do not have to endure similar situations:

I didn't wish for others to have those experiences. ... [They] emboldened me to... stay the course to open doors and make inroads for others, so that they wouldn't have to encounter that life is already hard, business is already challenging and or dynamic. The last thing we need is to also to have to expend energy trying to belong and or fit in.

Knowing the challenges that I've faced, I want to make sure that others have an opportunity to gracefully go beyond those challenges.

Particularly as many Executive Sponsors hold decision making positions, some executive positions, they possess important organizational knowledge and are in positions to influence the leadership board. The role of executive sponsors is regarded essential by ERG leaders because it provides the group credibility within the company. As discussed above, the company has yet to clearly define their role. I also observed differing perceptions on their responsibilities.

### **The Value of ERGs for Executive Sponsors**

Like ERG leaders, Executive Sponsors encountered situations where they felt underrepresented, as they often identify with the ERG's focal identity. One executive sponsor shared her experience of being the first African American Vice President within the company and continues to find herself in situations where she is the only one of her race and or gender:

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I've always been the person at the table that's different. So, I've worked in the insurance industry for more than 30 years, oftentimes – and this still happens today – I will go into a meeting, and there's not someone who looks like me. I'm African American, and I am a woman and so often times I would be the only woman and or person of color at the table.

Some find the ERG valuable as it allows them to positively influence individuals at earlier career stages, some develop mentoring relationships. Others find their ERG involvement includes a considerable workload while being invigorating at the same time.

### **The Value of ERGs for Members and the Workplace – Executive Sponsor perception**

**Cultivating relationships:** Executive sponsors observed that the ERGs build deep personal relationships. They emphasize the views of ERG leaders. One sponsor recounted:

Now I know of other Black colleagues that I didn't know about before. That gives me a sense of connectivity that I don't think I had before.

**Community:** Also sponsors observed the benefit of community building. For one executive sponsor, having a community leads to an increased sense of belonging and emotional connection. Another sponsor regards having a community to be the prerequisite for employees wanting to effect change:

My view is that an ERG should help create a community and a space for employees. And through that medium we can work to bring about change within the organization. But I feel like if employees don't feel a sense of connection and community, their desire and drive to create change within the organization outside of – 'Let me just do my job and go home' – I think is not there.

**Open dialogue:** Executive Sponsors observed that ERGs create opportunities for visibility and leadership for young professionals. They also noted that ERGs allow individuals to get their voices heard, and thus share the same view as ERG leaders. Particularly for employees holding strong opinions, ERGs provide a space for them to be heard. One sponsor noted:

There are always going to be individuals who have very strong beliefs and very strong opinions ... the ERG might give them the platform to voice those concerns and potentially feel like they had the ability to articulate their point of view.

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**Stress reduction and fulfillment:** An Executive Sponsor emphasized the importance of fulfillment for ERG leaders, noting that participation in ERGs enables ERG leaders to be part of something greater than people's daily responsibilities, and noticed:

If you are working 40,50,60h per week, you just need something like ERGs to be contend.

**Company culture:** Executive Sponsors emphasized ERG leaders' perception that ERGs enabled to build a cohesive work culture across the different locations and legal entities. One sponsor said:

[We have a] very distributed workforce. The idea that we can bring together employees who have similar interests or are committed to a certain topic was very compelling and interesting to us, because part of the company culture was to make sure that while we don't all see each other every day, ... we wanted people to feel strongly about the company, but we also wanted them to have a chance to ... pick your head up from work and have a chance to really delve into topics that might be of more of a personal concern.

The former Executive Sponsor of the PoC ERG noted that the ERG further helped increase people's cultural and social consciousness. Sponsors noticed a positive shift in the workplace culture, emphasizing the perspective of ERG leaders. One shift pertains to how people express themselves at work. One executive sponsor pointed out:

You came, you showed up, you fit in ... to now I can come and talk about who I am, how I live my life, who I love, what I value, very different than the workforce I probably entered, you know, over 30 years ago.

Another shift in the workplace culture Executive Sponsors observed involves a wider range of topics that are now appropriate to talk about. Sponsors thus underscore what ERG leaders have shared. Executive Sponsors observed a shift in conversations, supporting individuals to feel more comfortable expressing themselves and sharing personal aspects of their lives at work. One Executive Sponsor noted that:

Maybe it's okay for me to say this, maybe it's okay for me to share this, maybe it's okay for me to reveal this.

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The Executive Sponsor believes that because of this shift, people might slowly bring their full selves to work which ERG leaders have also observed:

When people in the company who have not historically brought as much of their self to work as they want to, that when they see these conversations happening and the company is obviously supportive of these conversations. I think that creates a perspective about the company that allows them to potentially feel more comfortable peeling back a piece of the onion that they've kept wrapped.

**Awareness raising:** With respect to what ERG leaders have observed, Executive Sponsors share the same view that ERGs raise awareness within and beyond the group. While the PoC ERG mostly focused on highlighting flagship months in the past, the executive sponsor is excited about increasing the awareness among allies and noted that effecting change requires to include those who are not directly impacted, and opening the group to allies:

But when you want to drive change, change requires making an impact to the world outside of the box that you've created for yourself as well. And removing those walls.

**Advocating for policy changes:** Some ERG leaders mentioned their influence on advocating for policy changes. In connection to this, an Executive Sponsors recounted how the Women's ERG aimed to address the gender pay gap. She mentioned that there was a consensus that salaries presented an area for improvement. However, the group encountered challenges in pursuing this goal, as the HR department did not share the necessary data. She noted:

What we are met with instead is: well, we can't just change salaries. We've got to worry about this or that policy or that guideline, or this regulation, or this perspective ... it's just a lot of hurdles to overcome.

### **The Value of ERGs for HR Practices – Executive Sponsor perception**

Executive Sponsors observed that ERGs play a crucial role in positioning the company as “employer of choice” with benefits in talent acquisition, onboarding, development, and retention. One executive sponsor mentioned in order to meet the company's goal of diversifying the talent pipeline, supporting structures need to be in place. ERGs are one of them:

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The women's network to me is an absolute necessity. If you're going to continue to amplify and diversify your workforce ... [and] if you're gonna have to meet certain goals around diversification. You can't help but have a lot of supporting functions in place.

**Talent acquisition:** One executive sponsor regards ERGs essential for attracting talent, asserting that the groups are “just good business sense,” as they also ensure representation of the customer target demographic. ERGs further play a crucial role in positioning the company as an “employer of choice,” as another Executive Sponsor noted, which helps recruit new talent.

**Onboarding:** Another executive sponsor regards ERGs an integral component of the onboarding process and support mechanism and thus supports the perspective of ERG leaders:

I guess you could just hire people, but it would really be difficult to hire people and then say, ‘Well, good luck. Hope you're happy here’ ... It's part of the fabric. It's part of the support network. ... We spend a lot of time giving people the tools to do their job. Right? We give them a computer. We give them all kinds of training. [ERGs], to me, [are] just a natural extension of your onboarding and the tools that you need to be successful at our company.

**Development and retention:** The sponsor of the Women’s ERG emphasized the importance of not only hiring individuals, but creating a workplace culture that retains them, especially women:

It's one thing to hire. Yeah, check the box. We've hit the number. It's another thing to have sustainability and the kind of culture where people feel comfortable, and women want to stay.

### **Support & Challenges – Executive Sponsor Perception**

Executive sponsors mentioned various support mechanisms. One executive sponsor, for instance, noted that even though there could be more support, the company provides a base:

I think the company is creating a space for things to happen that will contribute to the success of the ERGs. Is there more that could be done more proactively? Yes. But I think there is foundational support through resources.

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Regarding support mechanisms provided by the company for ERG leaders, sponsors list the following support mechanisms: time, the encouragement and opportunity to join an ERG, and visibility.

**Time:** Executive Sponsors noticed a lack of time to dedicate to ERGs, both for themselves and ERG leaders. This perspective aligns with what ERGs leaders observed as well. One interviewee resigned as an executive sponsor partly due to time constraints and questioned whether it is feasible to prioritize ERG work alongside other responsibilities, especially without managerial support:

Do I prioritize the work of the ERG when I have the work, my role and then do I have a manager or supervisor that is supportive of me spending that time? Because if they're not, then I'm having to use my personal time and if I'm having to always use my personal time, am I going to raise my hand to help as much as I would desire to help?

One co-sponsor of the Women's ERG recognized these challenges but emphasized the importance of prioritizing one's primary job responsibilities:

We also need to recognize that those that are part of the ERGs... have a job to do on their own ... We surely don't want this to be a distraction from that which they actually get paid for. ERG work is volunteer.

**Budget:** One executive sponsor noted "fighting for resource[s]," due to the limited budget allocated to ERGs. Another sponsor emphasized: "Obviously budgets is always a concern". Some sponsors did not address financial constraints. Overall sponsors agreed with the ERG leader perspective.

**Attract members & sustain commitment:** Attracting members and keeping them engaged is another challenge, noted by many executive sponsors – again supporting the ERG leaders' perspective. One sponsor noted a fluctuation in membership. Another believed that employees are hesitant to commit as the scope of ERG work is not clearly defined:

But most volunteers are afraid to commit because they don't know exactly what they're getting into and the amount of time that it will require.

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**Recognition & acknowledgement:** Many sponsors did not address the issue of lack of recognition, which was highlighted as a significant point of frustration for ERG leaders.

**Regionalization:** As explained above, all ERGs had to regionalize. The transition initially caused confusion for some sponsors; some mentioned the budgeting process. However, now, most appreciate the improved infrastructure for ERGs, which one executive sponsor compared to a “mini business.” Since then, many noted an increased strength of ERGs within the organization. Despite this, another executive sponsor feels that the PoC ERG lost value and views the regionalization as the ERG’s most restrictive factor. While the regionalization typically involved merging local chapters into a larger regional group, the PoC ERG was newly formed to encompass multiple separate ERGs, aiming to better serve the needs of all legal entities. She considers this is a challenge, as the ERG is responsible for acknowledging all people of color from “*every single culture* that you can think of.”

**Backlash:** One Executive Sponsor recounted how the Women’s ERG was initially accused of “bashing men”. She described how colleagues approached her saying that “we don't need a women's group [because] we don't have a men's group.” Nowadays, because more ERGs are present, she observed that the concern subsided.

### **The impetus for organizational support – Executive Sponsor perception**

Executive Sponsors enumerate various reasons why the organization supports ERGs.

**External forces:** For instance, the murder of George Floyd was mentioned as a catalyst. The company, according to sponsors, acknowledged that consequences of such incidents extend its influence on impacting individuals within the organization. It also resulted in a heightened awareness of the global leadership board. One executive sponsor said:

It was made more broadly proclaimed that people of color were being attacked and or killed in the streets. It was publicized on television. It was shown on social media, and so

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employees were part of their own local community were taking a stand, saying, ‘We don't feel good about this’ ... it became very front and center that people that were marginalized did not have as much support ... it was those kinds of things that were the catalyst for change.

**Valuing employees:** Many Executive Sponsors believe that organizational support stems from a notion of viewing employees as “their most valuable asset,” as one sponsor pointed out.

Another sponsor believes that the company acknowledges the empowering aspect of ERGs:

I think [the company] recognized that it's empowering for associates to be able to congregate if you will, and or to effect, change with people that have similar interest as themselves.

Yet others observed an organizational interest in creating an inclusive workplace while positively impacting business outcomes:

There is a desire to ensure the environment is one that employees can thrive in ... the other reason is because companies, for the most part, recognize that diverse views can come from people from diverse backgrounds ... wanting to create an environment where people can truly feel included and then want to benefit the business at the end of the day.

**Business value:** At the same time, many sponsors acknowledged the value of ERGs for the business. For one sponsor, supporting ERGs makes “good business sense”. She explained that if an organization’s target group is not represented in the organization, is detrimental to its success. This also seems true concerning upcoming retirements that require the hiring of new talent as she pointed out. Another sponsor further emphasized that the groups and employees’ main objective should be to ensure the company’s financial health:

It is indeed also a business play. It's not merely meant to be altruistic and a feel-good, but it does need to tie back to how it moves the company forward, and the company's been articulate about that.

In conclusion, executive sponsors play a pivotal role as connectors between the organization and ERGs, leveraging their leadership positions within the company to advance the goals of both the ERG and the firm. While some executive sponsors prioritize business objectives, they also identify strongly with the mission of ERGs, aiming to foster a more

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inclusive workplace for underrepresented employees. Drawing from their extensive tenure within the organization, these sponsors possess a deep understanding of organizational dynamics and have witnessed the evolution towards a more inclusive work culture over time. Given their unique positioning, some executive sponsors advocate for a business-driven perspective, viewing ERGs as instrumental in achieving organizational goals related to diversifying the talent pipeline and the overall firm's DE&I objectives. They acknowledge the original community-focused purpose of ERGs and recognize their strategic significance in advancing company interests. While some believe ERGs should align directly with company goals, others emphasize the importance of prioritizing community needs before driving organizational change. One Executive Sponsor summarizes it quite well:

I think it's important for employees to feel like they have community. I equally think it's important that we're driving visibility for the members of the ERG in a way that matters to the bottom line of the company.

After describing the perception of three stakeholders towards ERGs, all perspectives recognize the value of ERGs in cultivating relationships, fostering community, enabling open dialogue, providing personal fulfillment, contributing to policy changes, onboarding, retention efforts, and shaping company culture and reputation. Table 2 gives a summary of the key points observed. ERG leaders focused more on the value the ERG brings to the community, while some wished to be tasked with a business challenge to prove the ERG's value beyond the community-building aspects. Company representatives focused on the value of the ERG for the community, while the alignment with business imperatives is an exciting step in the future. Executive Sponsors emphasize the business ties and impact of ERGs more strongly compared to ERG leaders and company decision makers. Overall, all stakeholders see the value of ERGs for both the community and the business, even if the emphasis may differ slightly.

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Table 2: Summary of Main Findings

Summary of Main Findings			
<i>Perspective</i>	<b>ERG Leaders</b>	<b>Company Decision Makers</b>	<b>Executive Sponsors</b>
<i>Topic</i>			
<i>Acknowledgement of work</i>	Lack of formal recognition for ERG efforts. Proposals include compensated roles, financial support, and opportunities for conference participation	Acknowledge the prevailing lack of recognition and express intentions to advocate more prominently in the future.	Recognition of ERG acknowledgements not explicitly addressed.
<i>Resources</i>	Constrained primarily by resources, mostly time and budgetary limitations.	While resources might be limited, ERGs still receive fundamental support	Resource constraints present challenges in advancing ERG initiatives.
<i>Talent Attraction, Onboarding, etc</i>	Aspire for a more active role in talent attraction and onboarding processes.	Already perceive ERGs as active contributors and strategically leverage ERGs to recruit talent and diversify talent pipeline.	Utilizing ERGs towards employee lifecycle is “good business sense”
<i>Community</i>	ERGs were instrumental in building a more inclusive workplace and for employees to bring their authentic selves to work.	Recognize the value of ERGs to build a community that supports employees in other ways than formal organizational structures.	Strong impact on community building and fostering deep personal relationships, also for Executive Sponsors themselves.
<i>Business Alignment</i>	ERGs are predominantly geared towards supporting their members, while concurrently striving to demonstrate tangible business benefits, for	Recognize the dual value proposition: Primarily prioritize community impact yet acknowledge the desirability of	Recognize the dual value proposition, although there is divergence in whether prioritizing community or business interests.

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instance by solving  
business challenge.  
Others were more  
focused on providing  
value to their members.

bottom-line  
outcomes.

### 6. Discussion of Findings: The Reciprocal Value between ERG Communities and Organizational Goals

The aim of this thesis is to understand how the operation of ERGs is perceived across different levels of action – individual, group, workplace, and organization – with respect to community and business goals. I am further interested in examining how these levels interact and align with one another, and which levels are in synergy and where frictions might arise. Lastly, I want to analyze how individuals navigated such frictions.

The previous chapter provided insight into the perceptions of each stakeholder level and the areas where their perspectives converge or diverge. In the following section, I will synthesize these findings and analyze them based on the observed dynamics. To do so, I will introduce three models that illustrate the ERG's value for the business and the ERG community, along with potential spillover effects for each side.

The first model (Figure 2) outlines the value generated by the ERG for its community and illustrates how this value can spill over to impact the business (read from left to right). This dynamic will be elaborated upon using examples from the case study (Figure 3), where positive spillover effects will be depicted above the line representing the dynamics, while potentially unwelcome effects will be indicated below. The second model (Figure 4) delineates the value of the ERG for the business and elucidates how this contributes to the advancement of the ERG community. Similar to the first model, relevant examples will be provided (Figure 5) to demonstrate how this relationship manifests in practice. The final model illustrates the interplay between both sides, where a unidirectional dynamic cannot be readily observed (Figure 6). The examples presented in figure 7 will illustrate the dynamics at play, which can vary from positive to potentially negative depending on the circumstances. Table 4 gives an overview of the four main points observed.

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### 6.1. The Relationship between the ERG Community and the Organization

I distilled my observations about the different perspectives pertinent to ERGs into three distinct dynamics that add to the existing literature on employee resource groups. These models aim to elucidate the findings from both community and business perspectives, representing an innovative approach for simultaneously comprehending the operation of ERGs from multiple perspectives and rationales. Contrary to current literature, the models refer to ‘ERG Community’ instead of ‘Social Justice’ (cf. Byrd & Sparkmann, 2022; Tomlinson & Schwabenland, 2010). Upon discussing the terminology with the ERG leaders and Executive Sponsors, none felt that Social Justice accurately captured how their ERGs operate. The term ERG Community was proposed by many ERG leaders. Notably, the differentiation between organizational and ERG community objectives has previously only been addressed at an overarching DE&I level, rather than specifically in relation to ERGs. My research extends that view.

Initially, I describe the value of ERGs for its community and examine both the positive and potentially unwelcome impacts ERGs have on the organization. The second model outlines how organizations support or restrict the ERG community. In the third model, I explore a multidirectional model delineating the interplay of positive and potentially negative dynamics surrounding both the ERG and the organization.

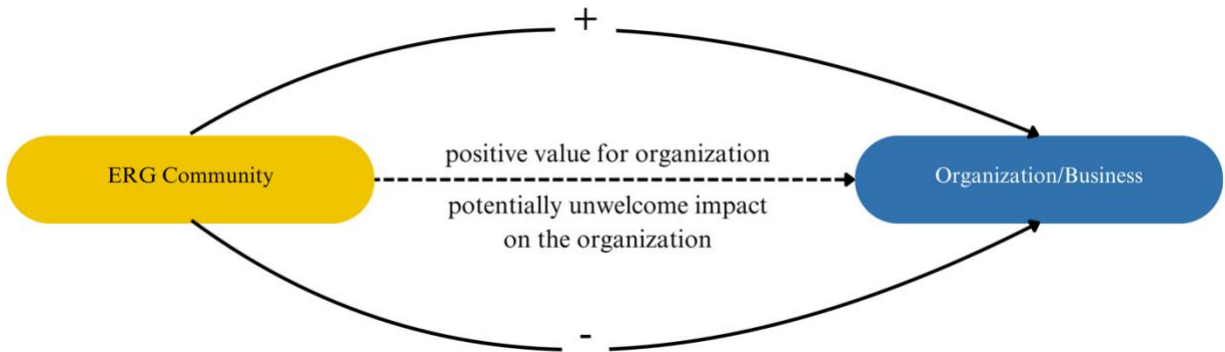
#### 6.1.1. *Model I: ERG Community First*

One dynamic I observed pertains to the ways in which the ERG community provides value to its members and leaders through its activities, and how these efforts subsequently impact and contribute to the organization. This dynamic might be explained by the ethical framework of deontology, which Gotsis and Kortezi (2013) describe as pursuing diversity for

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reasons of dignity and respect rather than solely for organizational profitability. In my view, their framework aligns with this model.

*Figure 2: Model I – ERG Community First*



This dynamic places the ERG community at its core, prioritizing the benefits to its members. Consequently, the impact on the business may be seen supplementary rather than the primary *raison d'être*. In discussions about these models with interviewees, one leader noted that the benefits brought by ERGs “by far” outweigh those returned from the business. This model resonated the most with many ERG leaders and executive sponsors. One ERG leader of the Women’s ERG holds the view that while the ERG presently emphasizes the community aspect, there’s a desire for closer alignment with business objectives to underscore the community’s integral role within the firm. Interestingly, some interviewees noted how they personally lean towards the community side, but recognized that the ERG itself leans towards the business side.

One executive sponsor noted that the ERG should first serve its community and only then the ERG might positively influence the business:

My view is that an ERG should help create a community and a space for employees. And through that medium we can work to bring about change within the organization.

One ERG leader said because its employee resource groups, ERG should benefit employees first:

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Obviously, employee resource groups should be focused on how we better be employees. How are we providing opportunities for employees? So I think it contributes to business goals but by way of the employees.

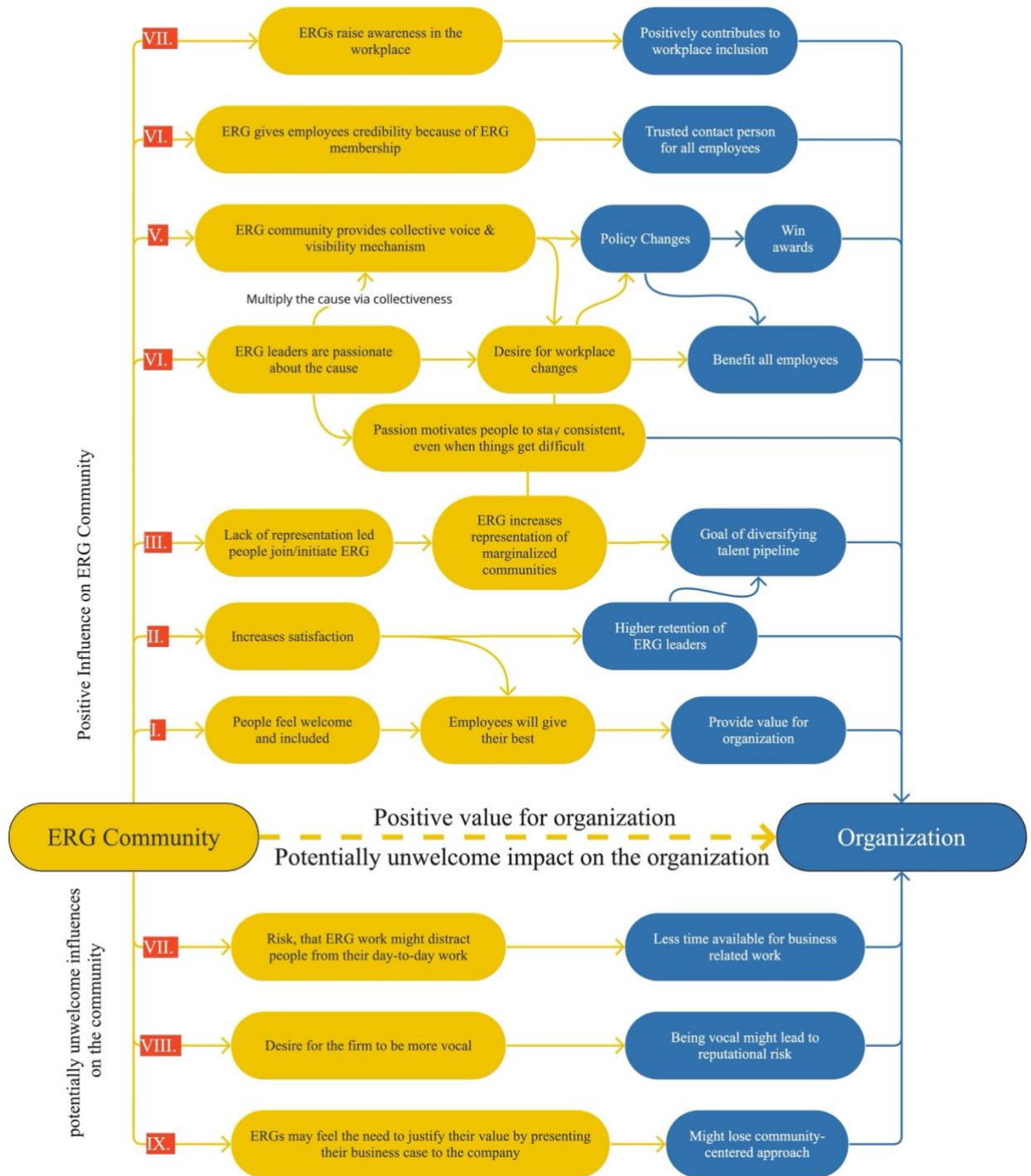
As discussed in the first section on the ERG leader's perception, ERG leaders and executive sponsors noted an increased job satisfaction because of their ERG involvement, and company decision makers noted an increased retention for ERG leaders (c.f. dynamic II. in Figure 3) This might support Friedman & Holtom's findings (2002) who found that ERGs reduce turnover especially for management level employees, which ERG leaders and executive sponsors are often part of.

In relation to the fifth aspect (V) in Figure 3, ERG leaders, members, and Executive Sponsors expressed that ERG affiliated employees are more open to express their thoughts and opinions on work-related matters. This included policy changes. They also feel comfortable addressing inappropriate comments within the safe space provided by the ERG. These observations might support previous research on voice mechanisms (see Bell et al., 2011; Colgan & McKearney, 2012; Hirschman, 1970). In line with Bell et al. (2011), I observed Pro-Social Voice Mechanisms. This included the expression of ideas to improve work and organizations. One example is the initiation of policy related changes by ERG leaders.

Finally, many interviewees mentioned the positive benefits ERGs had on creating a more inclusive workplace (Dynamic VII in Figure 3). For example, they pointed to awareness raising activities such as educational events. This finding thus supports previous scholarship (Cenkci et al., 2019; Singh et al., 2006; Van Aken et al., 1994).

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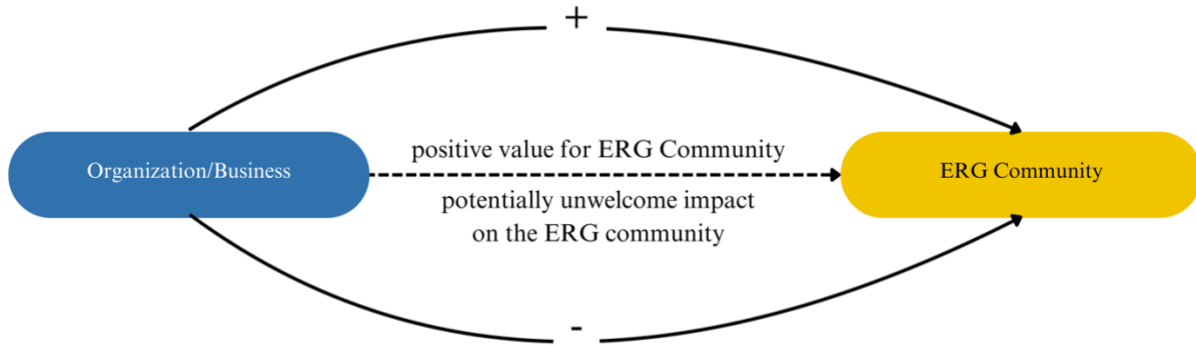
Figure 3: Model I featuring examples of observed dynamics.



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### 6.1.2. Model II: Company-Driven First

Figure 4: Modell II – Company First



The second model (see Figure 4) depicts the ways the organization utilizes the ERG while influencing the ERG community. Some of the ways the organization functions might potentially restrict the ERG. The premise that DE&I efforts, hence also ERGs, should yield benefits for organizations is rooted in Milton Friedman's Shareholder Theory (1970) which postulates that “there is one and only one social responsibility of business—to use its resources and engage in activities designed to increase its profits“ (last section, para. 33). Building on this notion, the organizational perspective is closely tied to the framework of consequentialism, which represents the idea that “diversity interventions should be based on a calculus of anticipated benefits and costs“ (Gotsis & Kortezi, 2013, p. 959). Integrating ERGs into business strategies can potentially enhance organizational outcomes and foster ongoing improvement, as suggested by Van Aken et al. (1994).

Executive Sponsors noticed while the ERGs initially centered around community goals, such as networking and community building, they recognized a transition towards business imperatives particularly within the last two years. Some sponsors emphasized the business aspect. One Executive Sponsor for instance believed that business needs must be met first. She said:

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We are here to meet the needs of our customers. It's just 'oh, by the way we happen to have these ERGs'. So, we're not here for the because of ERGs. [This is] not why the company exists. It just happens to be an aspect of the company. So, I think fair is fair and there has to be an appropriate balance.

Given the industry's talent drain and aging employee base, my findings show that ERGs are an effective means to develop leadership capabilities of employees (see dynamic I., Figure 5). This leads to an increased opportunity to recruit from within. I found that ERGs support organizational goals by helping position the company as an employer of choice for applicants. These observations emphasize previous findings (c.f. Cenkci et al., 2019; Douglas, 2008; Katz & Miller, 2020).

Dynamic II. (Figure 5) highlights the crucial role of ERGs in achieving this goal by enhancing the company's appeal to potential candidates and by providing developmental opportunities that contribute to building a diverse leadership pipeline. This finding emphasizes previous research by Welbourne and Ziskin (2012, cited in Welbourne et al., 2015).

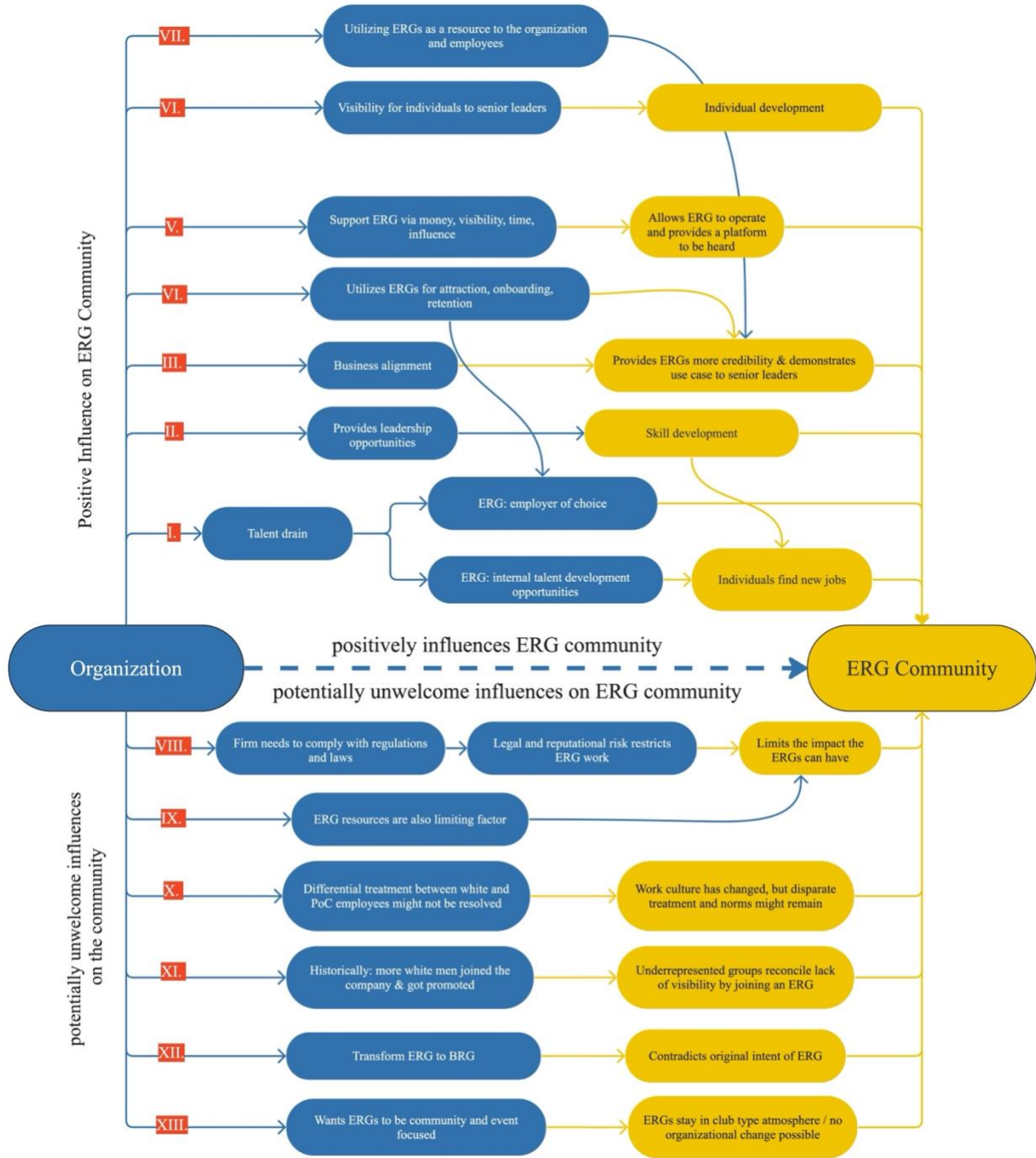
An integration with HR functions enables ERGs to attract, onboard, and retain talent, including the development of leadership capabilities of employees that led to an increased opportunity to recruit from within (see dynamic VI., Figure 5), aligning with previous findings (Cenkci et al., 2019; Douglas, 2008; Katz & Miller, 2020; Schlachter et al., 2023).

While the company supports ERGs via various mechanisms (see dynamic V., Figure 5), the organization may still limit ERG activities. In my case study, organizational decision makers restricted the ERG activities via global guidelines for International Women's Day that the Women's ERG had to follow. This caused frustrations for ERG leaders. Other limitations stem from legal and reputational risks associated with ERG initiatives (see dynamic VIII., Figure 5). Concerning such external layer of legal and societal influences, I learned that DE&I efforts have been increased overall after 2020. Lastly, the focus on community building and organizing

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events has resulted in ERGs maintaining a club-like atmosphere rather than making significant positive impacts on the business (see dynamic XIII., Figure 5).

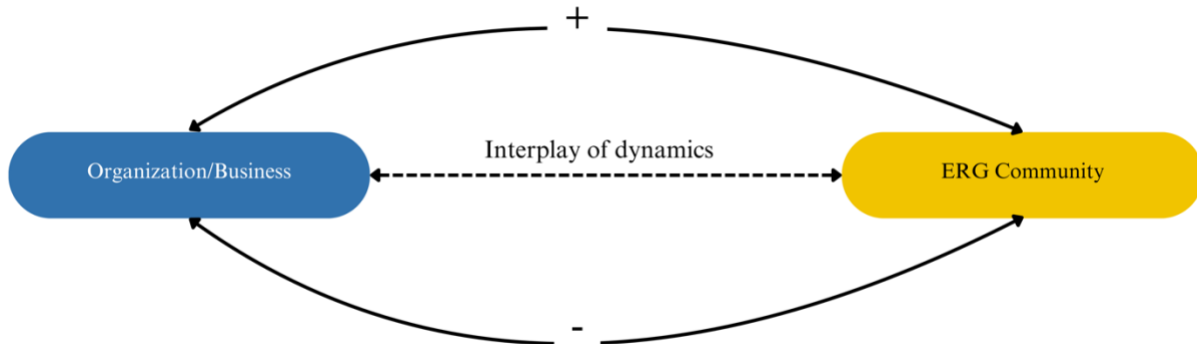
Figure 5: Model II featuring examples of observed dynamics.



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### 6.1.3. Model III: Dynamic Interplay of Forces Influencing the ERG and the Company

Figure 6: Model III – Dynamic Interplay between ERG Community and Organization



The last model (Figure 6) represents a circular relationship where both rationales might positively or potentially negatively influence on another. The Dual Value Assimilation & Integration model by Olsen & Martins (2012), proposing that organizations uphold the fair treatment of individuals for the sake of satisfying moral, social, or legal responsibilities while valuing the business case for diversity, might be transferred to Model III. Other scholars noted ERGs are situated within organizations, “mov[ing] between the business case and social justice case arguments” (Ahmed, 2007, p. 248; Foldy, 2019). This dynamic thus moves beyond the binary of either/or and presents how both rationales are interwoven. Upon presenting this model in follow-up interviews, some found that this model to resonate. As discussed in the previous section, some ERG leaders noted that they find themselves having to balance both rationales. One ERG leader mentioned that they need to present the business reasons behind their ERG activities in order to advance their goals while the DE&I coordinator believed that even though initially there was a need to present ERGs from a business case perspective, such approach is not necessary anymore. Another ERG leader emphasized that the PoC ERG is serving its ERG community first by highlighting issues pertinent to them. Simultaneously, she recognizes that because the ERG community is integral to the business, they also support the company:

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I would say it's a little bit of both because I think the main objective is ... the social aspect. Part of [the PoC ERG] is, ... to highlight marginalized communities, issues we face or to highlight the importance of whatever topic we may be discussing. But it also supports the business because we're supporting the people who operate the business.

One Executive Sponsor emphasized that the ERG should both benefit their community while impacting the bottom line of the organization:

It's important for employees to feel like they have community. I equally think it's important that we're driving visibility for the members of the ERG in a way that matters to the bottom line of the company.

Decision makers further noted a transition from focusing on “fun, flag and food“ towards impacting and educating the business. The Head of HR for instance, mentioned the new focus on the resource part of ERGs. Overall, representatives find it exciting to start utilizing ERGs to positively impact the company’s bottom line but are cognizant about the original intent of ERGs: building a community. As the Head of DE&I said, the goal is to provide value to the firm and the ERGs.

Overall, business alignment both enabled the ERGs by awarding credibility to their cause and demonstrated its use case to all employees. As identified in the previous section, such alignment also restricted the ERGs and imposed challenges on ERG leaders.

Figure 7 illustrates some of the observed dynamics concerning the interplay of dynamics. Because of its multidirectional character, a “+” indicates a potential positive influence, while the “-“ suggests a potential unwelcome influence. In discussion with company decision makers, they further noted that what might be positive some days, might be potentially restricting on others.

I found that ERG leader’s must balance their day job and volunteer ERG work (c.f. dynamic I, Figure 7). I pointed out instances where ERG leaders and executive sponsors stepped down from their responsibilities because of demanding day-jobs. This underscores research by

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Schlachter and colleagues' (2023) who found that ERG leaders' commitment to ERG work decreased when existing job responsibilities increased.

As discussed above, balancing the interests of the ERG community and business prompted ERG leaders to avoid being overly critical (c.f. dynamic II, Figure 7). Some interviewees noticed having to be cognizant about how they communicate and approach issues. This might emphasize Sloodman's (2022) findings that organizational embeddedness of ERGs requires careful consideration of the level of criticism to avoid jeopardizing the organizational support ERGs receive.

My research supports previous findings that underrepresentation led employees to join or initiate an ERG (c.f. dynamic III, Figure 7). Both ERG leaders and executive sponsors noticed that ERGs support the organizational goal of diversifying the talent pipeline.

Research by Jachimowicz & Weisman (2022) has shown that being passionate often means being willing to work overtime without additional compensation. Although their research focused on regular employment, my research suggests that this might also be true for volunteer work. My findings further indicate that ERG leaders and Executive Sponsors are more satisfied with their day-to-day-job because they can pursue their personal passion at work. This might then positively contribute to a higher retention of people from marginalized groups, thus benefitting business goals as well. Passion was also the common denominator why ERG leaders and Executive Sponsors got involved and stayed committed to an ERG (c.f. dynamic IV, Figure 7). Some interviewees felt that their passion fluctuated, while others found their passion to be constant with only their visible commitment to the ERG fluctuating due to main job responsibilities. My findings thus reveal novel nuances about the fluctuating nature of ERG activities (c.f. Scully & Segal, 2002).

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I have also shown that ERG membership mostly depends on one's manager (c.f. dynamic VI., Figure 7) and highlighted that one employee left the company after experiencing a lack of support from their manager. Because of such challenges, some ERG leaders and executive sponsors mentioned burnout as the consequence. My findings point to some new insights. Burnout might be prevented by recruiting new ERG members and leaders. Another member, however, mentioned that new ERG leaders bring a new challenge as there are always periods of adjustments within new teams<sup>6</sup>. Lastly, concerning the policy changes instigated by ERGs, I observed that particularly the Queer ERG and Women's was successful in doing so, aligning with previous findings (Cenkci et al., 2019; Githens & Aragon, 2009; Hossain et al., 2020; Katz & Miller, 2020). At the same time, the company was not always forthcoming with the necessary data to effect changes.

Upon gathering feedback from all participants in a subsequent follow-up interview, it was evident that the models effectively capture the dynamics present within the company. ERG leaders believe the models will be useful tools for describing the current state and identifying areas for improvement when presenting them to company leadership.

ERG leaders primarily identified with the first model, which emphasizes the ERG's provision of value to its community before spillover effects to the business.

Company decision makers with full time roles tended to resonate with the third model, which underscores the nuanced and multifaceted nature of ERGs, acknowledging that dynamics may appear positive on some occasions can also present challenges on other days. The ERG Coordinator, whose role is voluntary, resonated more with the first model. It is beyond my data to provide an explanation.

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<sup>6</sup> According to Tuckman (2001/1996), there are five stages of group development: Forming, Storming, Norming, Performing, and Adjourning.

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Responses from Executive Sponsors were divided, with some aligning with the focus on the ERG community (model I), while others resonated with the third model, emphasizing the interplay and, that in the end, the business has a more powerful voice than the ERG does.

Figure 7: Model III featuring examples of observed dynamics.



### 6.2. Reflecting Back and Looking Ahead

In the last section, I have discussed the observed dynamics and elucidated how the observations contribute to the current ERG literature. Now, I aim to sharpen our focus on the value of the models in enhancing our understanding.

As discussed, there is a need for a systematic and nuanced examination of the interplay between the ERG community and business imperatives within organizations. It's insufficient to solely concentrate on either the ERG community or the business, as ERGs exist as dynamic entities and are inherently interconnected in the organizational infrastructure, as depicted in the models.

Model I and II serve the purpose of individually highlighting the dynamics from either perspective. Dismissing models I and II as redundant would disregard the contributions from each side towards furthering the goals of the respective other side. It is essential to dissect the dynamics before looking at the more holistic view in model III. Moreover, considering the nature of such groups, encompassing attribute-centered, social-cause, and professional-centered ERGs (Welbourne & McLaughlin, 2013), it's evident that dynamics may unfold differently. For example, the community of a professional-centered ERG may primarily seek advancement within the company, aligning closely with business-driven objectives.

### 7. Conclusion and Recommendations for Further Inquiry and Practice

This thesis has made a significant contribution to the existing literature by presenting novel ways of thinking. It outlines the advantages of ERGs for individual members, the ERG community, the broader workplace environment, and the organization as a whole. A notable aspect of this study is the exploration of different stakeholder perspectives, a perspective largely unaddressed in previous research. Particular attention was given to elucidating the role of executive sponsors, an area that has been understudied in current literature. Through the synthesis of multiple stakeholder perspectives spanning the ERG community and business rationales, I shed light on the synergies and tensions inherent in the case study context. Additionally, I introduced three models to elucidate the dynamic interactions between community and business functions.

#### 7.1. Study Limitations and Directions for Further Research

The study focused on attribute-centered ERGs only. Findings are thus not generalizable to other types of ERGs and points to the necessity for future research to explore similar insights within social cause-centered and professional-centered ERGs, as well as investigating differences between them. Due to time constraints, not all ERG leaders were included in the sample, potentially affecting the ability to generalize findings across a broader population. I further did not include ERG members as membership is rather loosely defined in the organization under study. Additionally, interviews were conducted solely with decision-makers involved in DE&I efforts, omitting perspectives from all company leaders.

Furthermore, the study was based on understanding ERGs within a single company of the financial services industry in the United States. This focus might not be generalizable to companies in different contexts and thus limits the generalizability of findings (Creswell, 2014).

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However, the study provides a detailed procedure that enables future replication (ibid.). Future researchers might be interested in comparing firms across different countries and industries.

The study does not examine the outcomes or effectiveness of ERGs, prompting the need for further research to understand causal relationships between ERG operations and their activities' outcomes. External influences beyond those explicitly mentioned by interviewees were not considered.

### *7.1.1. Implications for Further Inquiry*

This study's systematic approach to understanding the operation of ERGs yielded new insights about the stakeholders' distinctive perspectives about the purpose of ERGs and their contributions at different organizational levels.

The burnout experienced by ERG leaders is another area for further research. This study suggests that employee's passion for ERG work and their commitment to sustaining the efforts of fellow members depends on organizational circumstances. Future research is needed to identify the organizational factors that curtail burnout and sustain commitment despite the challenges described in this project and elsewhere.

Furthermore, I only touched briefly on societal events that impart influence on ERG activities as any external layers were not part of my analysis. Future scholars might investigate how rulings and societal incidents specifically impact ERG activities and whether such societal developments also influence ERG's focus on community (or social justice) or business priorities or a balance of both.

I emphasized some insights into the ERG lifecycle, including factors that lead to a lack of commitment among ERG leaders and why oftentimes they step down (a lack of progress in tasks, lack of managerial support, repetitive nature of work, and overreliance on a small core team).

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These new findings call for further investigation into the factors influencing employees' decisions to join or refrain from joining an ERG. This knowledge might help to learn how to effectively recruit new ERG members. Future studies could also explore whether recruiting new ERG members helps mitigate ERG leader burnout as suggested by my research. This underscores the need emphasized by prior researchers for additional exploration into the dynamics of the ERG lifecycle (Foldy, 2019).

Lastly, I showed how that company finds the siloed approach of ERGs to be beneficial. Some ERG leaders and Executive Sponsors spoke to how they found one of their identities to be more salient in the workplace and thus decided to support the according ERG. As identity formation and reconciliation was not the focus of this research, I hope further researchers will explore how members bridge their intersectional identities via identity-siloed groups.

### *7.1.2. Recommendations for Organizational Practice*

My observations emphasize the exceptional value ERGs bring to both the communities they represent and the firm they are located in. It might be beneficial for practitioners and decision-makers to explore the root causes of the frustrations that have surfaced while also providing support for addressing the symptoms. This particularly relates to issues such as time constraints, lack of recognition, and burnout among ERG members and leaders. One potential avenue for improvement could involve implementing systematic methods for acknowledging the contributions of ERG leaders, such as through financial compensation or formalizing ERG leadership roles as official (part-time) positions. Financial incentives could help underscore the value of ERG leadership, in addition to verbal recognition. Additionally, addressing ERG leaders' desire to participate in conferences could enhance their sense of acknowledgment.

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Moreover, recognizing ERG work across the leadership board as legitimate work might further validate their contributions.

To address the prevalent issue of burnout among ERG leaders, companies might adopt a dual strategy. Firstly, efforts could be directed towards addressing the underlying causes by making ERG involvement more appealing, ensuring that employees can balance their day-to-day responsibilities with volunteer commitments without encroaching on personal time.

Concurrently, it might be worth considering offering mental health support as part of employee benefits to provide essential assistance in managing stress and burnout.

My findings further point to potential implications for decision makers, ERG-affiliated employees, and Executive Sponsors. For decision makers, I hope my findings are acknowledged as a way for ERG leaders to provide feedback. The models provide insights into the ERG leader experience. Recognizing the frustrations discussed above might and proactively adapting the current systems in place might alleviate some of the frustrations. The findings might further provide valuable information about the future ERG strategy.

For ERG leaders, these models hold promise not only for visualizing the working dynamics but also by pointing to areas needing improvement. ERG coordinators and leaders can utilize these models to observe specific case dynamics. This might be useful to highlight the areas where ERGs add value. I also envision the models to help affecting change and further work towards their goals by pointing towards areas of improvement. By visualizing the dynamics in three models, ERG leaders and ERG Coordinators might be able to utilize them to receive leadership buy-in. However, I do recognize that a foundational infrastructure must be in place for the models to be applied in a meaningful way.

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Because of the bridging nature of the Executive Sponsors' role, individuals can leverage their distinctive position to intervene more proactively, connecting community and business values more directly. They may act as a mediator between the former two positions. However, there is significant value in embracing ambiguities while also seeking to understand each stakeholder's perspective, which might help resolve some frustrations.

Leveraging the models of community and business-oriented dynamics to examine how efforts relate to observable outcomes present fruitful next steps.

### **Parting Thoughts**

I hope this thesis provides comfort to ERG leaders and members knowing that their struggles are not unique but shared by many. I also hope it acknowledges the unwavering commitment and passion so many ERG leaders and Executive Sponsors have for their ERG. My efforts in learning and describing the operation of ERGs and their value from different perspectives seems to be particularly relevant given the increase of Anti-ESG legislation across the United States. As many prominent voices are articulating anti-DE&I views, companies are starting to withdraw their DE&I efforts, which eventually affects employee resource groups.

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### Appendix

Table 3: Overview of Interviewees, affiliated ERG and their role within group

<b>ERG affiliation</b>	<b>Position</b>
N/A	Head of HR
N/A	Head of DE&I
N/A	DE&I Coordinator
N/A	ERG Coordinator
<b>Women's ERG</b>	ERG Leader
<b>Women's ERG</b>	ERG Leader
<b>Women's ERG</b>	ERG Leader
<b>Women's ERG</b>	Regional Executive Sponsor
<b>Women's ERG</b>	Regional Executive Sponsor
<b>Queer ERG</b>	ERG Leader
<b>Queer ERG</b>	ERG Leader
<b>Queer ERG</b>	ERG Leader
<b>Queer ERG</b>	Executive Sponsor
<b>PoC ERG</b>	ERG Leader
<b>PoC ERG</b>	ERG Leader
<b>PoC ERG</b>	ERG Leader
<b>PoC ERG</b>	ERG Member (former leader)
<b>PoC ERG</b>	Executive Sponsor
<b>PoC ERG</b>	Former Co-Executive Sponsor