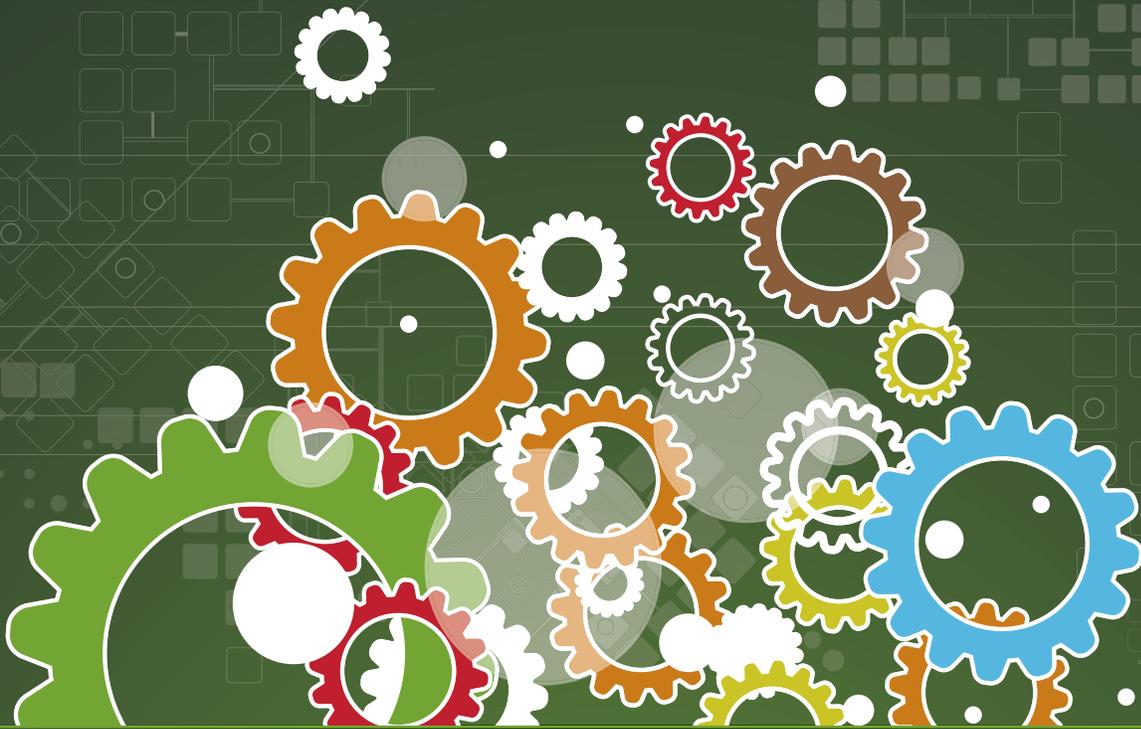




# TRANSFORMING ARIZONA'S ECONOMY



# EMPLOYEE RESOURCE GROUP BEST PRACTICES

## WHITE PAPER

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## WHITE PAPER

PRESENTED BY  
ARIZONA HISPANIC CHAMBER OF COMMERCE  
NOVEMBER 2014

RESEARCHED AND WRITTEN BY  
ROBERT RODRIGUEZ, PH.D.

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# EXECUTIVE SUMMARY

For the past 30 years, Corporate America has had Employee Resource Groups (ERGs), comprised of employees who connect based on shared characteristics, affinity, values, and life experiences. ERGs can typically focus on career advancement, community outreach, business impact, and cultural understanding. ERGs are valued because they boost employee morale, attract and retain employees, and can serve as a business resource. ERGs are so prevalent in Corporate America today that 90 percent of Fortune 500 companies have them.

ERGs have grown significantly due to the focus companies are placing on diversity and inclusion initiatives.

ERGs today are poised to make a tremendous impact on their corporations and are well positioned for sustained future growth. However, in spite of this rise in popularity and the potential for business impact, little is known about the ERGs that exist within companies that are strong supporters of the Arizona Hispanic Chamber of Commerce. This lack of deep insight creates a legitimate concern and a need for a more detailed investigation of the key issues these ERGs are facing within Arizona Hispanic Chamber of Commerce companies. This information would not only benefit corporations looking to enhance the impact and effectiveness of their ERGs, but also the Arizona Hispanic Chamber of Commerce as it looks to further strength the support and value it provides to its member companies.

Since no organization has studied ERGs within Arizona Hispanic Chamber member companies, nor captured trends and best practices related to these networks specifically, an opportunity exists to gain such insights. For these reasons, the Arizona Hispanic Chamber of Commerce launched a small research study at the end of 2014 to establish a benchmark for ERGs and to identify what is driving ERG growth. AZHCC hopes to identify what elements are leading to the success of these ERGs and what obstacles they are facing, all in an effort to better understand how companies and employees are both leveraging ERGs.

As you continue reading, you will learn about the state of ERGs within a few AZHCC member companies, our intent is to provide not only a demographic portrait of these networks that can be used for benchmarking purposes, but also to further the discussion of the rising popularity of ERGs and deepen our

understanding of the four (4) areas critical for sustained ERG growth and continued relevance: ERG impact, leadership, executive engagement, and the importance of benchmarking.

## ERG SURVEY PARTICIPATION

A select number of AZHCC Corporate Members were invited to participate in the ERG Research Study.

The study included a 30-minute phone interview with companies participating in the survey and an external diversity expert with deep subject matter knowledge on employee resource groups. The phone interviews were conducted in October and November 2014. Table 1 includes a list of the study participants.

### ERG RESEARCH STUDY PARTICIPANTS

1	Apollo Education Group
2	Arizona Public Service (APS)
3	CenturyLink
4	Cox Communications
5	Intel Corporation
6	Salt River Project (SRP)
7	United Parcel Service (UPS)
8	Vanguard

Table 1 - ERG Research Study Participants

## EXISTENCE OF EMPLOYEE RESOURCE GROUPS

6 of the 8 companies have existing employee resource groups in place currently. Of the 6 companies with ERGs, the compa-



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ny with the fewest existing ERGs had 5 while the company with the largest number of ERGs has 27 different types of ERGs with over 130 chapters globally (20 chapters alone in Arizona).

The most common ERG at these 6 companies was a Women’s ERG followed by race/ethnic ERGs such as Hispanic, African American, Asian American, etc. One company had several religion focused ERGs representing various religions such as Jewish, Muslim, Christian and even an Agnostic/Atheist ERG. Table 2 list some of the various types of ERGs that exist at the companies that participated in the study.

TYPES OF ERGS
African American
Arab American
Atheist/Agnostic
Asian American
Disability
Filipino
Hispanic / Latino
India
Iranian
Jewish
LGBT/PRIDE
Millennials
Multi-Faith
Muslim
Native American
Pakistani
Russian
Veterans
Vietnamese
Women
Working Parents/Families

Table 2 - Types of ERGs

Of the companies with existing ERGs, one company has had ERGs for close to 30 years and another for over 20 years. Most of the others launched their ERGs within the last 10 years.

Of the two companies that did not have existing ERGs, one planned to launch 2 employee resource groups in 2015. The other company has one national diversity council with 9 regional diversity councils. These diversity councils are similar to ERGs but they do not focus on any one particular group, affinity or shared characteristic. The organization indicated that even though they have diversity councils in place, they do plan to launch more traditional ERGs in the next year or two.

## EMPLOYEE RESOURCE GROUP PARTICIPATION

The companies with existing ERGs had fairly strong participation by their employees. The average percentage of their workforce that was a member of at least one ERG was approximately 12%. One company indicated they have approximately 6,400 total employees of which about 1,900 are members of one of their ERGs resulting in an ERG penetration rate of close to 30%. The companies in the study fared much better than the national average because across corporate America, most companies strive to obtain a participation level between 8% - 10% of their employees to be a member of one of their employee resource groups.

With regards to the number of employees who are members of one specific ERG, the range was quite large. Most of the companies in the study indicated that the membership size of their ERGs was between 50 members to 500 members. One organization indicated however that their Women’s Network has close to 5,000 members alone spread across their entire corporation.

When asked to describe the profile of the employees who are members of their ERGs, most described that ERG members tend to be predominantly individual contributors and managers. A few indicated they do have some directors and vice presidents involved in the ERGs but this seemed to be more of the exception and not the norm.

The company with the diversity councils however indicated that the membership in their councils tended to be more senior level executives with most being at the general manager, vice president and director level.

## ALLOCATED ERG BUDGET

As with membership, the budget allocated to these ERGs varied greatly. A couple of companies allocated the same amount to each ERG regardless of the size of the ERG. One company allocated a budget of approximately \$5 for each member of a particular ERG. Others allocated a budget based on the development of an annual business plan by the ERGs that indicated the amount of financial support they would need in order to fund their ERG initiatives for the following year.

Of those companies that shared the amount of their ERG budgets, the range was between \$500 annually per ERG to a high of close to \$25,000 per year for one of their ERGs. One company indicated they previously charged employees a membership fee in order to join an ERG but they recently eliminated this practice.

Nationally, the average annual budget allocated to ERGs is about \$7,200 per year for every 100 members of an ERG. So if an ERG has 200 members, on average those ERGs receive close to \$14,400 on an annual basis. If an ERG has only about 50 members, on average they receive about \$3,600 per year and so on.

## ERG LEADERS AND TRAINING

Almost all of the survey participants with existing ERGs indicated that the leaders of their employee resource groups are elected by the ERG membership. These ERG leaders usually have served as a member or in a committee lead role within the ERG before being chosen by the ERG leaders to serve as the president or chairperson for the ERG via some sort of election process. One company indicated they have no real process for identifying the leaders of their ERGs saying that most of their ERG leaders simply volunteer to lead the group. The company that has diversity councils, as opposed to ERGs, indicated that their leaders are appointed by the corporation based on their experience and capability to lead a diversity council that includes several senior level leaders.

Surprisingly, only one company seemed to have any formalized training designed specifically for the leaders of their employee resource groups. This company holds an annual ERG Leadership Summit where they bring in the leaders of their employee resource groups for two days of training very specific to their roles as ERG leaders. This training focuses on topics such as having a Strategic Mindset as an ERG Leader as well as training on external ERG trends and best practices. Most of the other corporations indicated that the development received by their ERG leaders results via their experience and efforts as an ERG leader.

## ERG METRICS

Several companies that participated in the survey indicated they have difficulty in capturing the value and impact of their ERGs via metrics. Each company indicated that they highlight the activities of their ERGs each year but identifying consistent and relevant metrics proved to be elusive.

Of those companies that did try to measure the impact and value of their ERGs, they mostly relied on metrics tied to business goals related to supplier diversity and new business generated. Others used metrics related to membership growth, number of community volunteer hours and evaluation scores from their professional development workshops. Several companies indicated that they ask employees to identify whether they are a member of an ERG when they conduct their annual company employee engagement survey. Those companies then analyzed the engagement survey results to see if those employees who were in an ERG scored higher than those that indicated they were not a member of an ERG.

## ERG ACTIVITIES

There was consistency among the companies that have ERGs when it came to ERG activities and initiatives. Almost all indicated that their ERGs support community outreach efforts via sponsorship of external non-profit organizations, holding fundraisers for community organizations, volunteering at community-based organizations or being speakers at local schools.

Several also highlighted very specific ERG efforts to drive business results. As mentioned earlier, these efforts ranged

from identifying new potential diverse suppliers, helping to secure new clients, raising existing customer service scores and overall promoting the business brand for the company. One organization provided training to their ERG members about their business and how the organization makes money so that the ERGs can strong as strong business ambassadors for the company.

The area of focus that seemed the most prevalent are those related to professional development and career advancement. Some companies have mentoring circles for their ERG members, others offer a variety of professional development workshops for their members, and one even holds Toastmaster sessions for their ERG members. Others tend to focus on raising the visibility of ERG members with top executives.

Finally, some ERGs focused on raising the level of cultural competency within a company. For example, their Hispanic ERG holds events during Hispanic Heritage Month aimed at raising the level of understanding of Hispanic culture. Others have their Veterans ERGs work with recruiters to help the organization better recruit military veterans. Others have their LGBT employee resource groups support initiatives promoting equality and the end of discrimination in the workplace based on sexual orientation.

Overall the employee resource groups within the companies that participated in the study seem to be strong, thriving and growing. This mirrors what is happening across most of corporate America. The goal however for these companies is to focus on ways to sustain their current success, replicate that success across all their ERGs, and to ultimately scale ERG success across the entire enterprise.

## ERG RECOMMENDATIONS

Based on the findings from this study, and reviewing ERG trends and best practices across corporate America, the following 5 recommendations are offered.

### ADOPT THE 4C ERG MODEL:

The 4C ERG Model proposes that everything an employee resource group does can fall into one of four

separate components (Career, Community, Commerce and Culture). Each is described in Table 3 below:

4C CATEGORIES
<p><b>CAREERS</b></p> <p>ERG efforts aimed at promoting career advancement and professional development fall in the Career category. Such efforts are highly coveted by ERG members and often serve as the main reason they join an ERG. Career initiatives enhance the capability of ERG members and help to turn ERGs into talent engines that groom the next generation of ERG leaders.</p>
<p><b>CULTURE</b></p> <p>Culture initiatives strive to enhance the cultural competence within an organization. Here ERG efforts are focused on helping to raise awareness of cultural nuances connected with individuals from a specific affinity. Culture efforts also include trying to enhance the recruitment and retention of employees from a specific community. Finally, culture efforts also lay the foundation for future ERG success by strengthening ERG governance via by-laws, ERG leader descriptions and ERG structure.</p>
<p><b>COMMUNITY</b></p> <p>There are ERG efforts that support community outreach and help the company be a strong ambassador in the communities in which they operate. Community efforts also include any activities aimed at benchmarking with other ERGs and initiatives that support collaboration with both internal and external partners.</p>
<p><b>COMMERCE</b></p> <p>ERG efforts that support commerce initiatives are any initiatives related to driving business results. These include ERG efforts to help penetrate new client markets as well as efforts aimed at increasing insights of consumers with diverse backgrounds. More and more companies are elevating the business focus of their ERGs.</p>

Table 3 – 4C Categories

The 4C ERG Model is best represented via the circumplex model illustrated in Figure 1. Those ERGs that are having sustainable, long-term success are those where ERGs have a strong impact across all 4Cs over time. While it is common that during any one point in time an ERG will be strong at one C area over another C area, data suggests that top tier ERGs must have an impact on all 4Cs.

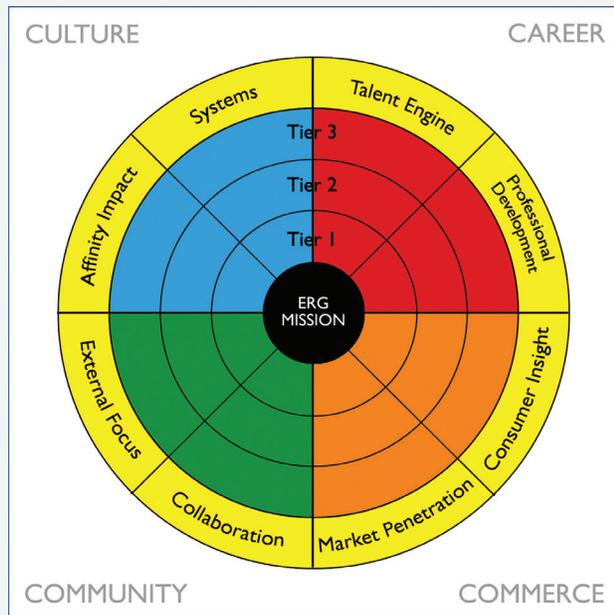


Figure 1 - 4C ERG Model

In just the past four years alone, over 200 corporations have adopted the 4C ERG Model as a strategic framework for their employee resource groups. Some of the companies that leverage the 4C Model include Allstate, State Street, MetLife, SC Johnson, Manpower, Best Buy, NBC Universal, Avon, Unilever, Northwestern Mutual, Johnson Controls, BMO Harris Bank, Cap Gemini, Pacific Gas & Electric, Liberty Mutual, Chrysler and Hyatt Hotels to name a few.

Companies that leverage the 4C ERG Model do so for a couple of reasons. First, it provides a simple, yet powerful strategic framework for ERGs to operate within. This allows ERGs to prioritize their initiatives while reminding them of the holistic value they can provide to an organization. Second, is that the 4C Model allows companies to assess the impact, effectiveness and overall health of their employee resource groups. Third, the 4C ERG Model also provides a diagnosis for organizations as to what are the key elements that are in place for high performing ERGs as well as those areas are need further attention for ERGs that are struggling. And finally, because

so many companies use the 4C Model and have taken the assessment that coincides with the model, organizations can now benchmark themselves against the ERGs at over 200 companies for comparison purposes. Figure 2 below shows how the 4C ERG assessment can be used by companies to track the progress and evolution of their employee resource groups.

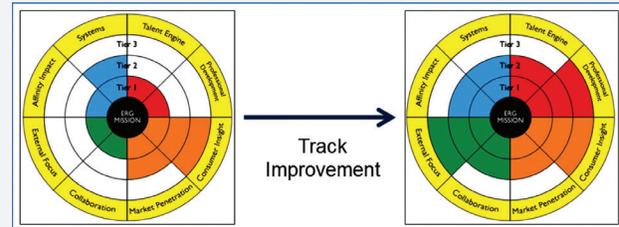


Figure 2 - 4C Assessment Results

Adoption of the 4C Model would be relatively easy for the companies that participated in the survey. Many already have initiatives that fall into each of the 4C categories but have various names for such efforts.

## PROVIDE TRAINING FOR ERG LEADERS:

It is quite clear that much is expected from employee resource groups. In particular, much is expected from the ERG leaders who have to guide their ERGs while performing successfully in their full-time roles. However, more and more companies are realizing that if they are expecting high performance from their ERG leaders, they must provide these leaders with training specific to their ERG roles.

A trend across corporate America is the establishment of an internal ERG Leadership Academy. Such an academy encompasses training and development designed and delivered specifically to ERG leaders. The format for these offerings varies. For some companies, their ERG Leadership Academy consists of a one or two day summit for leaders of their ERG to come together, share best practices, learn about corporate initiatives and establish ERG goals. At other companies, the ERG Leadership Academy consists of a formalized curriculum of courses that ERG leaders and their governance teams must take over a period of time.

Regardless of the format of an ERG Leadership Academy, the focus area of such training tends to fall into one of four categories outlined in Table 4.

## ERG LEADERSHIP ACADEMY FOCUS AREAS

### COMPETENCY BASED

Training focuses on enhancing and building specific competencies of the ERG leaders. Common examples include workshops on Strategic Mindset, Change Management, Championing Diversity or Leading through Influence.

### TEAMWORK BASED

Training focuses on ensuring that ERG leadership teams are working well together. The emphasis is to create high performing ERG leadership teams. Common workshops include session on joint decision making, dealing with conflict, team effectiveness.

### OUTCOMES BASED

Training is focused the outcomes that companies would like to see from their ERGs. For example, if an organization would like the ERGs to help with diversity recruiting efforts, then the ERGs participate in diversity recruiting workshops. If companies want their ERGs to support multicultural marketing efforts, then the ERGs participate in multicultural marketing workshops.

### EXTERNAL BASED

Many companies feel that it is important for their ERGs to keep current with external ERG trends and best practices. They therefore consistently provide their ERGs with an external perspective, usually provided by external consultants with knowledge of external trends. Companies that provide such training hope that gaining an external perspective will influence how their ERGs operate internally.

Table 4 – ERG Leadership Academy Focus Areas

Regardless of the format or topics addressed, companies are realizing the importance of making an investment in developing their ERG leaders. ERG leaders are often doing quite a bit of heavy lifting and such training and develop helps

them function in their ERG leadership role more effectively. Plus some companies use such training as a reward for their ERG leaders because the training is exclusively provided to ERG leaders and serves as an informal perk.

## TOPGRADE YOUR ERG LEADER ROLES BY ALIGNING WITH TALENT MANAGEMENT:

At many companies, the demand for leaders greatly exceeds the supply. Look at the membership roster of most employee resource groups and you'll find job titles of employees who are mostly individual contributors and specialists. Occasionally, you'll see a member who is a manager, and even more rare, a member who has achieved the level of director.

For employees at the director level and above, ERGs simply are not seen as relevant. ERGs have grown in sophistication and become more global, and most are now tasked with having a stronger alignment with business and marketplace goals. These are just some of the indicators that show that ERGs need an influx of top talent. The challenge for an organization is to create employee resource groups that will attract senior-level members who have stronger leadership capabilities and possess the ability to build teams and implement a strategy.

What's needed, therefore, is an approach that will allow organizations to turn their ERGs into a destination for seasoned leaders looking for growth experiences in diversity. There is a growing realization that to be an effective contemporary leader in an increasingly multicultural and global world, one needs to have firsthand experience with managing diversity in a savvy and effective way.

ERGs are often treated as leadership incubators, providing junior staff the chance to flex talent muscles they might not have the opportunity to otherwise. The thinking is that if companies give ERG members access to professional development workshops and experience running a team and developing strategy, ERGs will build the next generation of group leaders. However, once these ERG members begin to demonstrate their true leadership capability, they often leave the ERG. While helping to produce more leaders for the organization is still a valuable outcome, it does little to meet the growing leadership demands of the ERGs.

Corporations also tend to assign senior leaders and executives

to serve as ERG sponsors or advisors, rather than as leaders of these groups. This is not necessarily a bad decision, but often these busy individuals provide limited attention and support to the ERG. In many cases, the executive sponsor or advisor never has been an ERG member and thus has a limited perspective on what is needed to elevate performance.

Promoting from within an ERG helps to create a steady pipeline of future group leaders who have the visibility of and access to powers that be within the larger organization. This allows companies to identify and groom young, high-performing individuals for not only future ERG leadership roles, but also leadership positions across the broader organization. When done successfully this serves to entice those outside of the ERG to become members.

This approach requires a commitment to succession planning within ERGs and the overall organization so that employees serving as ERG leaders experience this role as a true stepping stone to more senior positions. This requires a tighter partnership with HR's well-established leadership development strategies and programs.

To be truly effective, this approach must be replicated, sustained, and scaled across all ERGs within an organization. And yet, employee groups that only serve as incubators for ERG and organization leaders are missing out on a key leadership resource. ERGs should also be open to leaders who have been nurtured in the formal parts of the organizations. Doing so requires corporations to include ERG leadership in their systematic leadership rotation programs.

Systematically bringing more senior leaders into the ERG immediately brings two benefits: their very presence and involvement serves as a magnet for other top performers and established leaders who already have the skills, savvy, and political capital necessary to make things happen within the organization.

The ideal candidates for this strategy are those who have been deemed high performers and have the potential to become future executives within the corporation. Often these individuals have reached the role of director and, in some cases, vice president. JPMorgan Chase and McDonald's Corporation are just a few of the companies that regularly have top business leaders and vice presidents at the head of their employee resource groups.

The desire to bring in more senior level talent into ERG leadership roles is also behind the reason more and more companies

are appointing the leaders of their ERGs as opposed to having the ERG leaders elected by the membership. Back in 2010, DRR Advisors conducted a study and found that approximately 90% of companies allowed their ERG leaders to be elected by their members and only 10% of companies appointed their ERG leaders. In 2004, DRR Advisors polled these same companies regarding their ERG leader selection promise and the number of companies that now appointed their ERG leaders rose to 30% while 70% still allowed their ERG leaders to be elected by the membership.

## GREATER ALIGNMENT WITH BUSINESS GOALS:

ERGs derive power from the broad range of perspectives contributed by their members. Unfortunately, many organizations haven't embraced this diversity in their commerce initiatives. Their ERGs have failed to draw out the vitality and potency of their members' stories, dreams, and wishes from a commerce perspective. As a result, members' ideas are not brought to the surface and ERGs are unable to support revenue generation or cost containment initiatives. Without bold steps to improve ERGs impact on commerce efforts, the very existence of ERGs is threatened.

Next generation ERGs make the biggest business impact by focusing on two areas: consumer insights and market penetration, both which help to expand the customer base. From a consumer insights perspective, ERGs should strive to serve as internal advisors for their firm's sales and marketing departments on how to reach unique markets. Because of their natural understanding of diverse market segments, ERGs are well positioned to provide unique cultural insights, establish relationships with community leaders, and build trust among these consumers.

ERG contributions often include serving as a focus group, providing input on affinity marketing initiatives, and testing products prior to launch to ensure they cater to unique customer preferences. Some of the most advanced ERGs actually establish advisory councils in which members support affinity marketing initiatives. Ultimately, firms see the remarkable significance in capturing likes and dislikes straight from the distinct consumer segments they are hoping to tap.

Sometimes the only internal corporate resource able to provide this is an ERG. What a valuable market focus group to have within one's corporate walls. With such an approach, and by affecting company profitability, it's no wonder these ERGs

serve as an asset for the company. ERGs that achieve this status and relationship with various business units can often justify increased funding based on their achieved business results.

ERGs must also be leveraged to strengthen and sustain a brand's status in diverse consumer segments. Many believe that ERGs should be challenged to bring forth those very profound consumer insights that a conventional product leader typically pays a lot of money to obtain.

Firms that do this successfully do so by highlighting the uniqueness that their members bring to the organization. These organizations have figured out that true innovation and creativity is best achieved by inviting ERGs, and their diverse perspectives, to contribute to the idea generation process.

It's an approach that makes sense, especially given the consumer buying power of various market segments, including a burgeoning racial and ethnic minority market in the U.S.

## CONCLUSION

ERGs across the country are at a crossroads. They are either ascending in their prominence or their relevancy is being questioned. In either case, ERGs and the companies they operate within must confront the realities outlined in this paper. In doing so ERGs need to be ready for new ways of thinking and operating that may be counter to long-cherished notions of what makes ERGs tick.

This will require courage and effective leadership. Companies also need to reevaluate their views of ERGs. It's puzzling how some organizations don't aggressively support their ERGs even while many of their senior leaders recognize that diversity provides a competitive advantage. It's organizationally inconsistent when some ERG activities are undermined by management at a time when leadership rhetoric seems focused on engagement and retention and more open lines of communication.

The ERGs at the companies that participated in this study are brimming with the potential to provide collaborative breakthroughs that build competency among its members, rather than dependency. Because of the competitive nature of business today, organizations cannot afford to operate in a manner that prevents ERG members from being heard. If this happens, organizations miss potential contributions, innovations, solutions and creativity of these valuable employees.

Companies and ERGs that embrace the new approaches presented here will go a long way in reaping the benefits of strong, vibrant employee resource groups.

### AUTHOR

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Rodriguez is the president of DRR Advisors, a boutique diversity and management consulting firm ([www.drradvisors.com](http://www.drradvisors.com)). DRR Advisors has worked with close to 150 corporations helping them with their diversity initiatives. DRR Advisors specializes in employee resource group optimization, Latino talent management programs and the development of diversity strategy.

Dr. Rodriguez has been a columnist for *Diversity Executive* magazine for the past 6 years and was previously a writer for *HR Magazine*. He is the author of the book, *"Latino Talent: Effective Strategies to Recruit, Retain and Develop Hispanic Professionals"*.



He holds a doctorate in Organization Development and is a graduate of the Latino Leadership Institute at UCLA. He previously taught in the MBA program at DePaul University in Chicago and is currently a faculty member in the Latina Leadership Institute at USC.

Previously Dr. Rodriguez held corporate leadership roles at Target, 3M, BP Amoco, The Washington Post and RR Donnelley & Sons. He was also the a senior vice president for the national office of ALPFA, one of the nation's largest Latino professional organization.

From 2010 – 2013, Dr. Rodriguez organized the ERG Corporate Challenge for the United States Hispanic Chamber of Commerce that identified the best Latino ERG in the country. Dr. Rodriguez is also the creator of the 4C ERG Model and the 4C ERG Assessment Instrument.



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