



CLEO Bay Area

Membership Overview

2020

Dr. Robert Rodriguez

CLEO Founder and President of DRR Advisors

- Dr. Robert Rodriguez is the President of DRR Advisors LLC, a boutique diversity consulting firm specializing in Latino initiatives, employee resource groups and diversity strategy.
- Dr. Rodriguez has worked with close to 200 corporations helping them elevate the impact and effectiveness of their diversity initiatives.
- Author of two Latino leadership books:
 - “*Latino Talent: Effective Strategies to Recruit, Retain & Develop Hispanic Professionals*” (2008).
 - “*Auténtico: The Definitive Guide to Latino Career Success.*” Co-written with Andrés Tapia (2017).
- Former columnist for *Diversity Executive* magazine. Has been featured in *The Wall Street Journal*, *BusinessWeek*, *Hispanic Executive* and *Latino Leaders*. Named one of the Top 100 Most Influential Latinos in Corporate America by *Hispanic Business* magazine.
- Previously held corporate leadership roles at 3M, Target Corporation, BP Amoco and The Washington Post. Also served as SVP of Consulting for the national office of ALPFA.
- Holds a PhD in Organization Development. Teaches Latino leadership courses at Southern Methodist University (SMU) in Dallas and at the University of Southern California (USC) in LA. Established the 2-Day *Latino Leadership Intensive* development program at Stanford University in Palo Alto.
- Serves on the Advisory Council of the Hispanic Scholarship Fund (HSF) and is a Board Trustee for the National Museum of Mexican Art in Chicago.
- Frequent speaker for Latino non-profits such as HACR, Prospanica, SHPE, NHCC, ALPFA, and HNBA.



CLEO Bay Area

Launched in 2018

1

Launched in 2018, a new entity called the *Consortium of Latino Employee Organizations (CLEO)* was established in the Bay Area of California. This new entity is called **CLEO Bay Area**.

2

CLEO Bay Area leverages the foundation established by Conexiones, a network of Latino professionals in the Bay Area that has shared ERG best practices for the past several years.

3

What differentiates **CLEO Bay Area** from Conexiones is a more formalized operation model. This operation model has been utilized successfully for the past 10 years by a similar group called CLEO Chicago and was developed by Dr. Robert Rodriguez of DRR Advisors.

4

Since 2008, CLEO Chicago has gathered the Latino ERG leaders from 40+ Chicagoland corporations to meet on a quarterly basis. CLEO Chicago members gather to share best practices, network, find areas to collaborate and participate in professional development.

5

Similarly, the objective of **CLEO Bay Area** is to gather the leaders of Latino ERGs from top corporations in the San Francisco / Silicon Valley area on a quarterly basis to share best practices, network, find areas to collaborate and participate in professional development.

6

The ultimate goal of **CLEO Bay Area** is to elevate the impact, performance and effectiveness of the Latino ERGs that exist in the Bay Area. **CLEO Bay Area** will be managed and run by Dr. Rodriguez of DRR Advisors.

CLEO Chicago

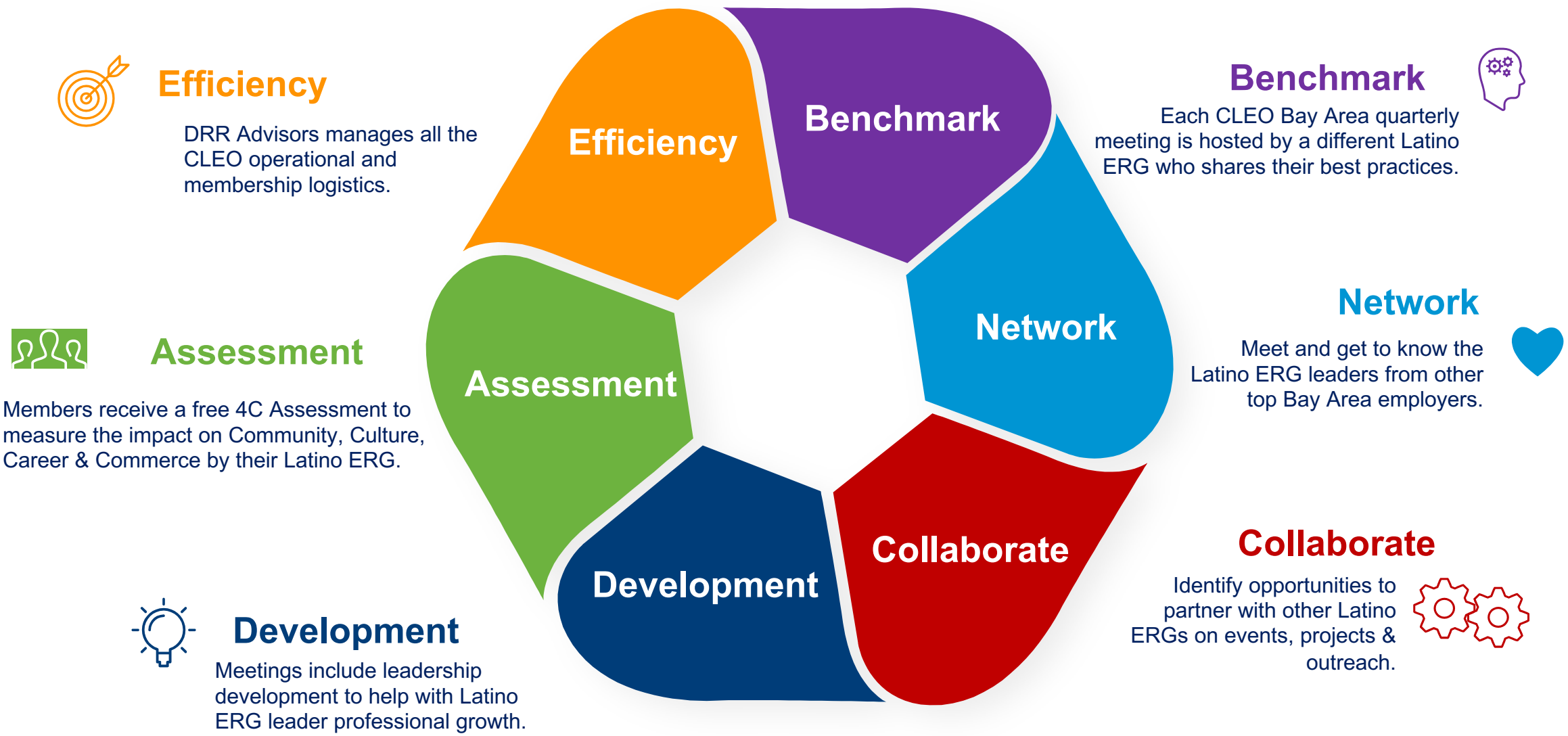
CLEO Bay Area is a Replication of the Successful CLEO Chicago Model

- DRR Advisors has successfully managed CLEO Chicago since 2008. Since then, the Latino ERG leaders of CLEO Chicago have met **every** quarter (close to 45 separate meetings) to benchmark and to address the most pressing topics Latino ERG leaders face.
- The goal is to replicate the operation and success of CLEO Chicago with CLEO Bay Area.

CLEO Chicago Member Companies (Latino ERGs)		Past CLEO Chicago Meeting Topics
<ul style="list-style-type: none">• Abbott Laboratories• AbbVie• Accenture• Allstate• AonHewitt• American Airlines• Astellas Pharma• Barilla• Blue Cross Blue Shield• BMO Harris Bank• BP• Caterpillar• CDW• CME Group• DePaul University• Deloitte• EY• Facebook	<ul style="list-style-type: none">• General Electric• Google• Groupon• H&R Block• Hyatt Hotels• JonesLang LaSalle (JLL)• KPMG• Kellogg's• MillerCoors• Nielsen• Northern Trust• Northwestern University• RR Donnelly & Sons• SC Johnson• Sodexo• Uber• U.S. Cellular• W.W. Grainger	<ul style="list-style-type: none">• Current State of Latino Leadership• ERG Metrics-that-Matter• Latino Identity in the Workplace• Latino Marketing Best Practices• ERG Succession Planning• Latino Recruiting Trends & Best Practices• Getting on a Non-Profit Board• Moving from a Manager to a Leader• Engaging Executive Sponsors• The Essence of Latina Leadership• The Importance of Authenticity in the Workplace• ERGs during Mergers and Spin Offs• ERG Chapter Expansion and Field Locations• Engaging Middle Managers into ERGs• Influencing without Authority• Essentials of Latino Leadership Programs• How Latinos are Portrayed in the Media• Latino Purchasing Power

CLEO Bay Area

Value Proposition



CLEO Bay Area

Quarterly Meeting 2 Hour Agenda



Networking & Welcome (10 Minutes)

- Each CLEO meeting is hosted by a different member company.
- All attendees introduce themselves at beginning of meeting.



Updates and Announcements (10 minutes)

- Newest CLEO member companies are introduced.
- CLEO related announcements and future meeting host identified.



Host Latino ERG Overview (50 minutes)

- Latino ERG of the host company shares an overview of their ERG.
- Structure, pillars, strengths, & future plans. Followed by Q&A.

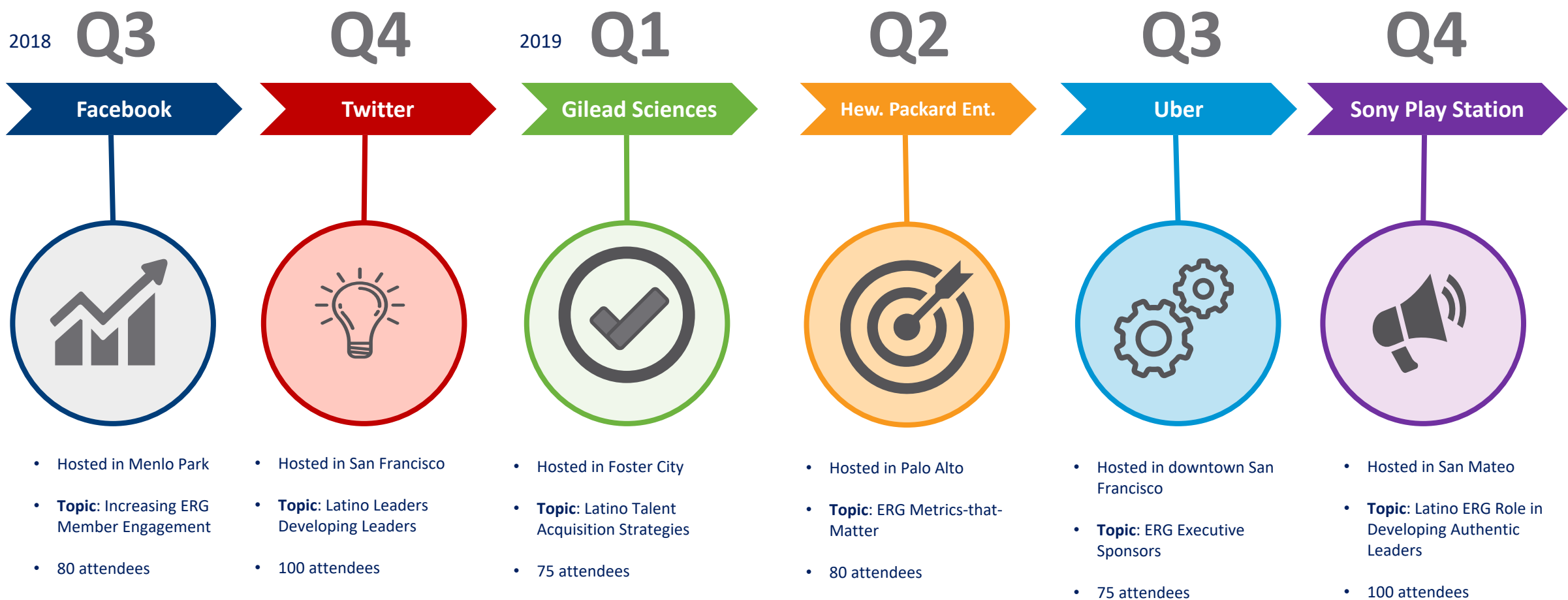


Leader Development Topic (50 minutes)

- Participants engage in a leadership development session.
- Focus either on ERGs effectiveness or Latino talent programs.

CLEO Bay Area Meetings

Quarterly meetings will be rotated between San Francisco, Mid-Bay and South Bay company locations



CLEO Bay Area Company Attendees

These companies have sent a Latino ERG member to at least one of the first 4 CLEO meetings held to date



Abbott Labs
Accenture
Apple
Adobe
Adroll
Affirm
Amazon
Asana
Box



CBRE
Cisco
Clorox
Cloudera
Comcast
Copa Airlines
Coursera
Databricks
Dell EMC



Deloitte
Dignity Health
eBay
E&J Gallo
Ernst & Young
Facebook
Gap
Genentech
Gilead Sciences



GitHub
Google
Groupon
Hewlett Packard Ent.
IDEO
Indeed
Intel
Intuit
Kaiser Permanente



KPMG
Lyft
Medallia
Microsoft
Morgan Stanley
Netflix
Nielsen
Oath
Oracle



Pacific Gas & Electric
Pandora
Pinterest
PWC
RSM
Salesforce
Sony
Splunk
Square



StubHub
Tesla
Twitter
Uber
Visa
VMware
Walmart
Wells Fargo

CLEO Chicago or CLEO Bay Area member companies

Each CLEO Bay Area meeting has had between 75 – 100 Latino ERG members in attendance.

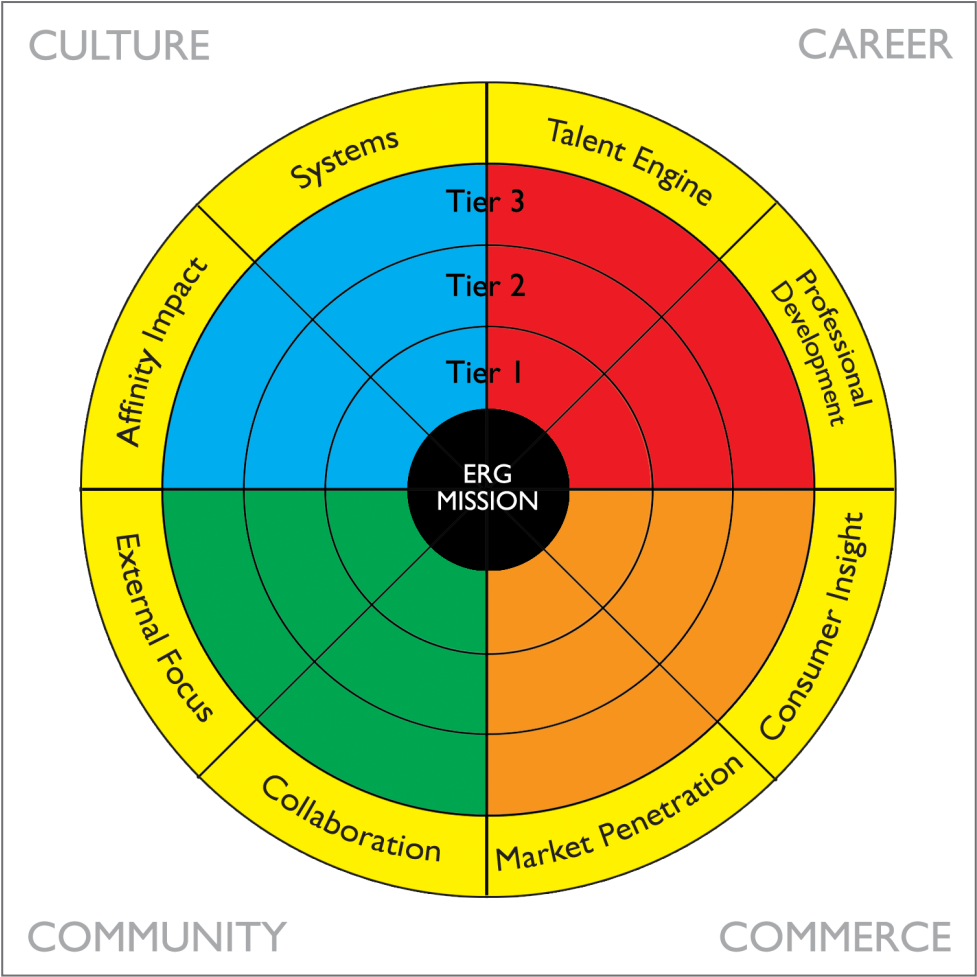
CLEO Bay Area

Paid CLEO Bay Area Member Companies as of 1/1/2020

Abbott	Accenture	Adobe	Box	CBRE	Comcast
Facebook	Gap, Inc.	Gilead	HPE	Intuit	Kidaptive
Microsoft / LinkedIn	Morgan Stanley	Netflix	Nielsen	Oracle	Pacific Gas & Electric
PwC	Salesforce	Stanford Health Care	Sony PlayStation	Splunk	Square
Twitter	Uber	Visa	VMware	Walmart	Wells Fargo

4C ERG Assessment

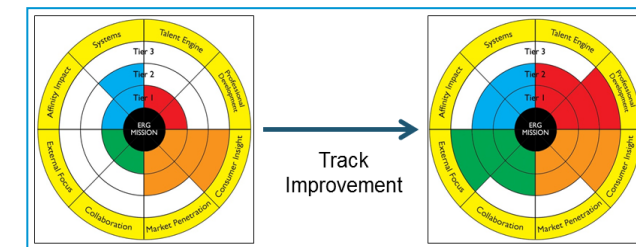
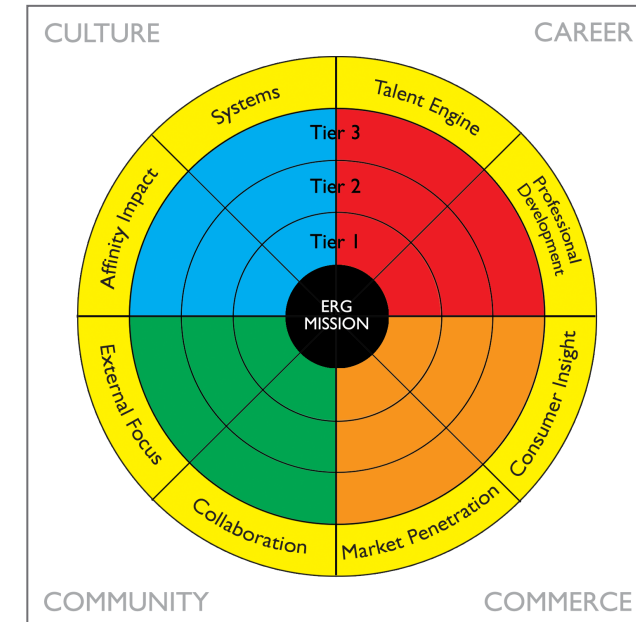
Each CLEO Bay Area company receives a complimentary 4C ERG assessment of their Latino ERG



4C ERG Assessment

Allows a company to assess their Latino ERG against a normative database of Latino ERGs at 200 other firms

- The 4C Model provides a multidimensional perspective on ERG effectiveness. The model allows ERGs to assess their current health, impact and effectiveness.
- The model measures the impact and effectiveness of an ERG on 4 key holistic elements:
 - Culture
 - Careers
 - Commerce
 - Community
- ERGs are able to compare themselves to other ERGs by capturing their scores and comparing it to a normative database of other ERG scores. The results place the ERG on a 3 tier level for each element based on a percentile score.
 - Tier 1 Emerging (50th–69th Percentile of ERGs)
 - Tier 2 Advanced (70th–84th Percentile of ERGs)
 - Tier 3 Strategic (85th Percentile of ERGs & above)
- ERG scores are captured on a visual circumplex which serves as a dashboard to gauge ERG progress.



CLEO Bay Area Member Requirements

All CLEO Bay Area member companies must agree to the following

Company Profile

- Membership is company based and not by an individual member.
- Company must have an established Latino ERG or about to launch a Latino ERG.
- Every CLEO member company must be willing to host a future CLEO meeting.
 - Provide meeting room for up to 100 attendees
 - Handle attendee registration
 - Provide refreshments
 - Define security, registration and parking requirements

Participation & Confidentiality

- Agree to do everything they can to send at least 1 Latino ERG member to each CLEO Bay Area quarterly meeting.
- Company agrees to keep CLEO Bay Area member contact information in confidence and not share contact information with non-CLEO Bay area members.
- Company is encouraged to conduct the 4C ERG Assessment on their Latino ERG but it is not required.

CLEO Bay Area Membership Benefits

Specific benefits for each CLEO member company

- 1) Ability to connect and benchmark with the leaders of Latino ERGs from numerous Bay Area corporations.
- 2) Up to 4 employees from each CLEO Bay Area member company are able to attend each quarterly meeting.
- 3) Contact information (name, company & email address) to Latino ERG leaders for each CLEO Bay Area member company.
- 4) A complimentary 4C ERG assessment of the Latino ERG of the CLEO Bay Area member.
- 5) Access to quarterly leadership development sessions related to ERG effectiveness or Latino talent management.

- 6) Periodic discounts and invitation to special Latino events.
- 7) Receive complimentary Latino and ERG related white papers and research findings.
- 8) Opportunity to promote company products and services to CLEO Bay Area members to align with business initiatives.
- 9) Opportunity to have Latino ERG members from other companies participate in focus groups to obtain Hispanic consumer insights.
- 10) Receive electronic versions of presentations given at past CLEO Bay Area meetings.

CLEO Bay Area

Paid Membership Options

<ul style="list-style-type: none">• Join CLEO Bay Area only	<ul style="list-style-type: none">• \$ 1,000.00<ul style="list-style-type: none">• Covers CLEO Bay Area membership through June 2021
<ul style="list-style-type: none">• Join both CLEO Bay Area and CLEO Chicago	<ul style="list-style-type: none">• \$ 1,400.00<ul style="list-style-type: none">• Covers CLEO Bay Area membership through June 2021• Covers CLEO Chicago membership through June 2021
<ul style="list-style-type: none">• Join CLEO Bay Area, CLEO Chicago and CLEO Twin Cities	<ul style="list-style-type: none">• \$ 1,600.00<ul style="list-style-type: none">• Covers CLEO Bay Area membership through June 2021• Covers CLEO Chicago membership through June 2021• Covers CLEO Twin Cities membership through June 2021

Questions

Contact if interested in joining CLEO Twin Cities or have questions regarding membership

Robert Rodriguez, PhD
President – DRR Advisors LLC

Robert@DRRAdvisors.com
872-230-3853

