



CLEO Chicago

Group 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 related executive education courses at Southern Methodist University (SMU) in Dallas and University of Southern California (USC) in LA. Runs 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 Chicago

History, Purpose and Expansion

1

In 2008, Dr. Robert Rodriguez gathered the Latino ERG leaders from 13 companies in the Chicagoland area to establish the Consortium of Latino Employee Organizations (CLEO). The first **CLEO Chicago** meeting was hosted by the Latino ERG at Allstate Corporation.

2

Since that first CLEO meeting in 2008, **CLEO Chicago** has successfully gathered the Latino ERG leaders from 50+ Chicagoland corporations to meet every single quarter for a total of over 45 **CLEO Chicago** meetings since inception.

3

Every quarter **CLEO Chicago** member companies gather to share best practices, benchmark, network, find areas to collaborate and participate in professional development.

4

Each **CLEO Chicago** meeting is hosted by a different member company giving Latino ERG leaders the chance to visit the headquarters of fellow member companies. Each host then also provides an overview of their Latino ERG.

5

In 2018 Dr. Rodriguez launched **CLEO Bay Area** to similarly gather the Latino ERG leaders at tech companies in Silicon Valley. The first 4 **CLEO Bay Area** meetings have been hosted by Facebook, Twitter, Gilead, and Uber. In 2019, CLEO Twin Cities is being launch in MN.

6

The ultimate goal of **CLEO** is to elevate the impact, performance and effectiveness of the Latino ERGs. CLEO Chicago, CLEO Bay Area and CLEO Twin Cities are managed and run by Dr. Rodriguez of DRR Advisors.

CLEO Chicago

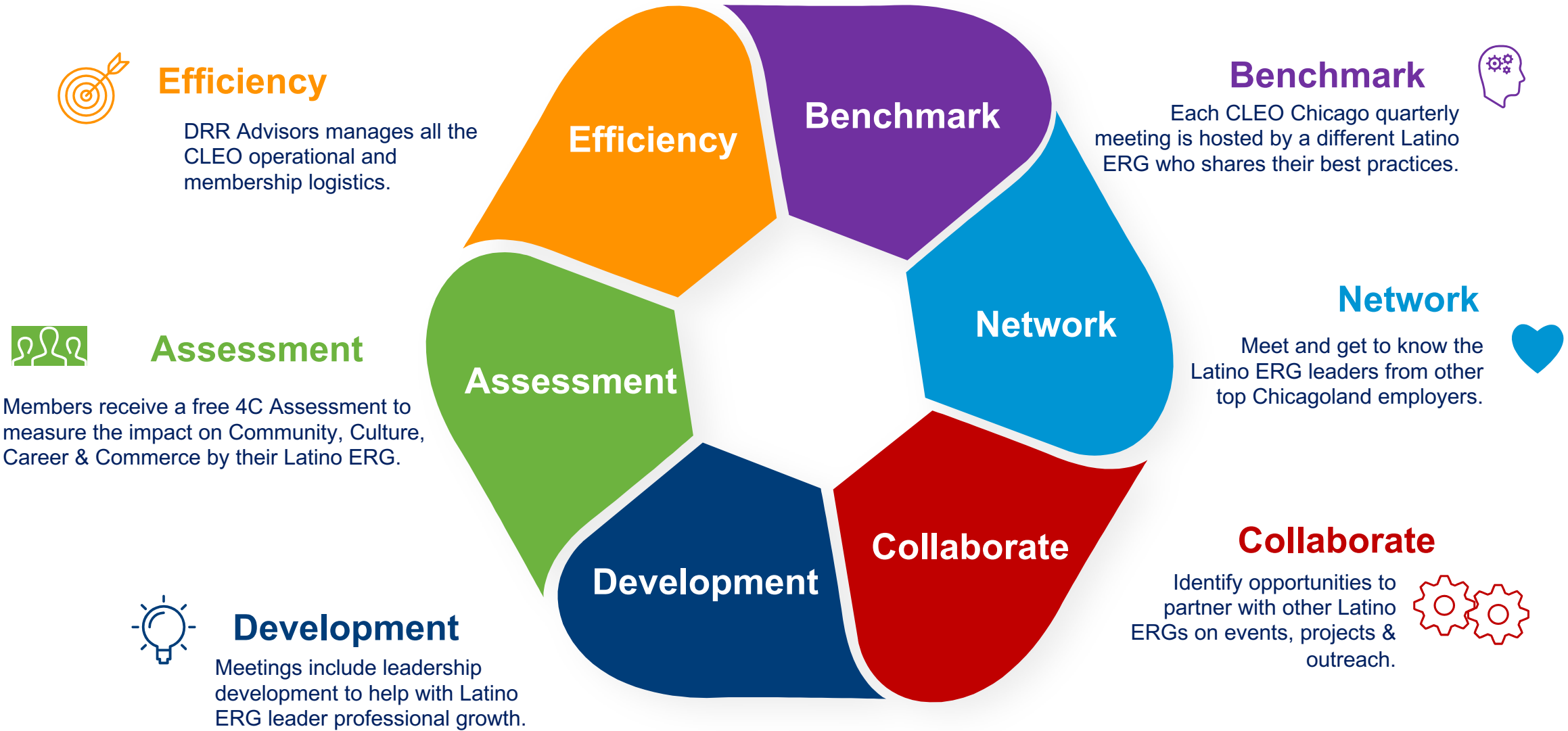
Member Companies and Past Meeting Topics

- 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.

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• Comcast• CDW• CME Group• DePaul University• Diageo• Facebook• General Electric	<ul style="list-style-type: none">• Google• Groupon• H&R Block• Hyatt Hotels• JonesLang LaSalle (JLL)• KPMG• Kellogg's• Microsoft/LinkedIn• 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 Chicago

Value Proposition



CLEO Chicago

Standard 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.

Past CLEO Chicago Meetings

Year	CLEO Member Host	Topic
2009	Allstate	• Current State of Latino Leadership
	Kraft Foods	• Moving from a Manager to a Leader
	Abbott	• Promoting Your ERG
2010	Northern Trust	• Personal Branding
	MillerCoors	• Non-Profit Board Service
	W.W. Grainger	• ERG Trends & Best Practices
	PepsiCo	• Speed Networking
2011	JPMorgan Chase	• Assessing ERG Performance
	Crowe Horwath	• Latino Marketing Strategies
	Kellogg's	• Latino Non-Profit Panel Session
	KPMG	• Partnering with Latino Non-Profit Associations

Past CLEO Chicago Meetings

Year	CLEO Member Host	Topic
2012	BCBS - Illinois	• Supporting Latino Market Initiatives
	Deloitte	• Latino Leadership Development
	BMO Harris Bank	• Latino Educational Attainment
	Seyfarth Shaw	• Latino Recruiting
2013	Ernst & Young	• ERG Strategic Frameworks
	Accenture	• Engaging Executive Sponsors
	General Electric	• Hispanic ERG Research Study Report
	Fifth Third Bank	• ERG Metrics
2014	Deloitte	• Latina Leadership
	MillerCoors	• Hispanic Marketing & CLEO Social
	General Electric	• ½ Day Summit and 5 Year CLEO Anniversary
	Baxter Healthcare	• Impact on ERGs during Company Mergers

Past CLEO Chicago Meetings

Year	CLEO Member Host	Topic
2015	BP/Caterpillar	• ERG Chapter Expansion
	Nielsen	• Engaging Middle Managers
	MillerCoors	• Latino ERG Panel Discussion
	KPMG	• Evaluating Latino Leadership Programs
2016	DePaul University	• Influencing without Authority
	MillerCoors	• ERG Leaders – Election or Appointment?
	Astellas Pharma	• The Business Case for ERGs
	NBCUniversal/Telemundo	• Latino Identity in the Workplace
2017	JonesLang LaSalle (JLL)	• Latina Leadership
	DePaul University	• Latinos & the Media- Maria Hinojosa (LatinoUSA)
	MillerCoors	• <i>Auténtico</i> Book Launch
	Accenture	• Importance of Authenticity in the Workplace

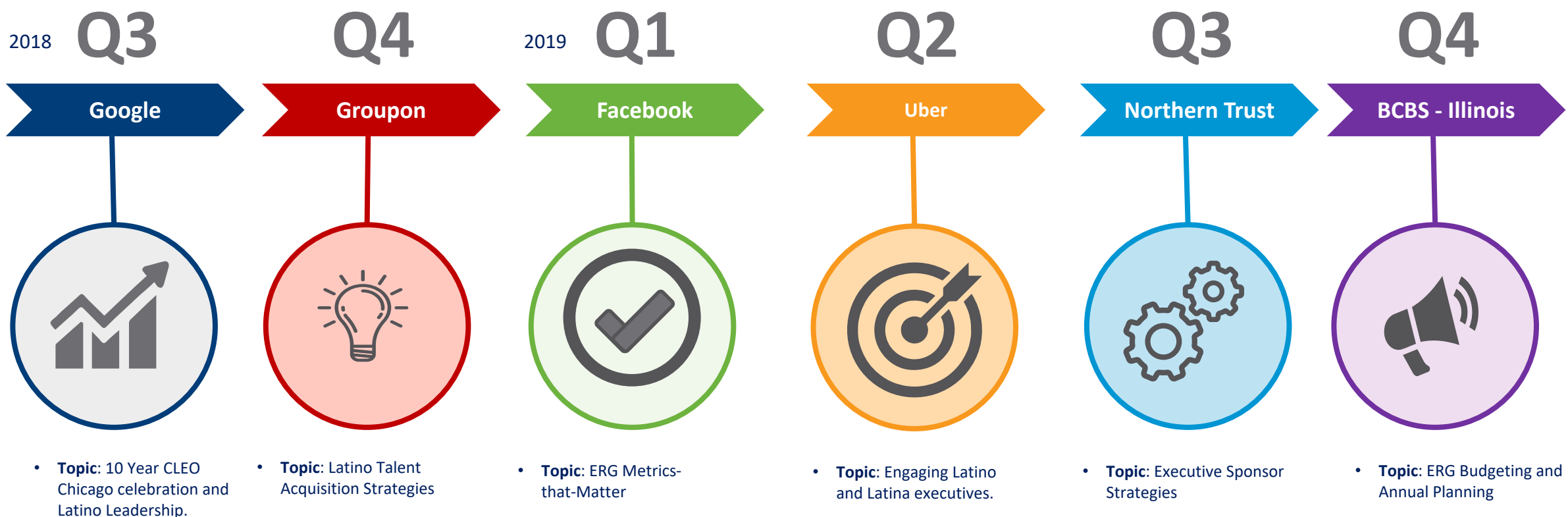
Past CLEO Chicago Meetings

Year	CLEO Member Host	Topic
2018	Northwestern University	• Latino Talent Summits
	Facebook	• CLEO Strategic Planning Session
	Google	• CLEO 10-Year Anniversary Celebration
	Groupon	• Latino Talent Acquisition Strategies
2019	Facebook	• ERG Metrics-that-Matter
	Uber	• Engaging Latino and Latina Executives
	Northern Trust	• Executive Sponsor Strategies
	BCBS – Illinois	• ERG Budgeting and Annual Planning

- To view pictures from past CLEO Chicago and CLEO Bay Area meetings, go to the CLEO Facebook page via the link below:
 - https://www.facebook.com/pg/cleochicago/photos/?tab=albums&ref=page_internal

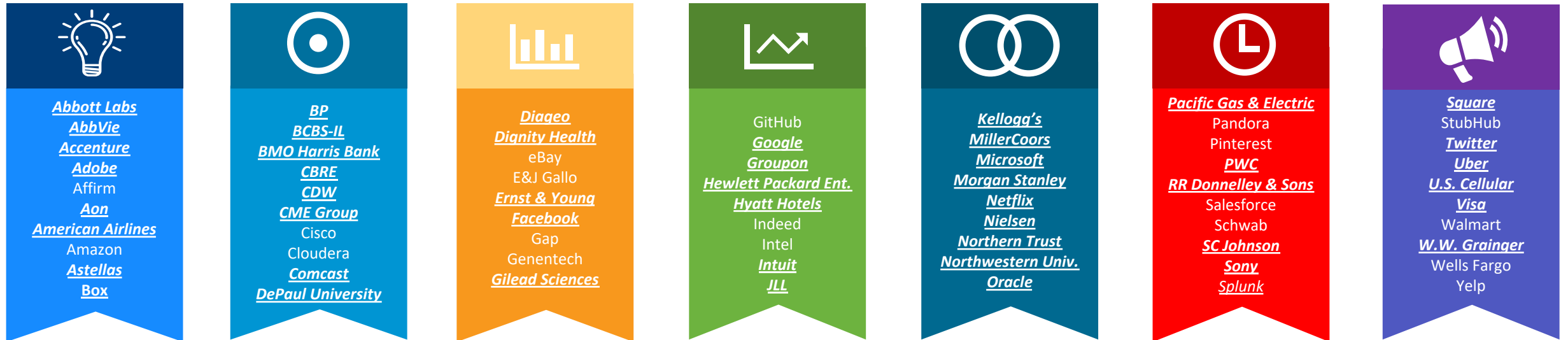
CLEO Chicago

Meetings are mostly held downtown Chicago with occasional meetings in Northern & Western Suburbs.



CLEO Meeting Attendees

Each company has sent someone to at least one of the last 4 CLEO Chicago or CLEO Bay Area meetings

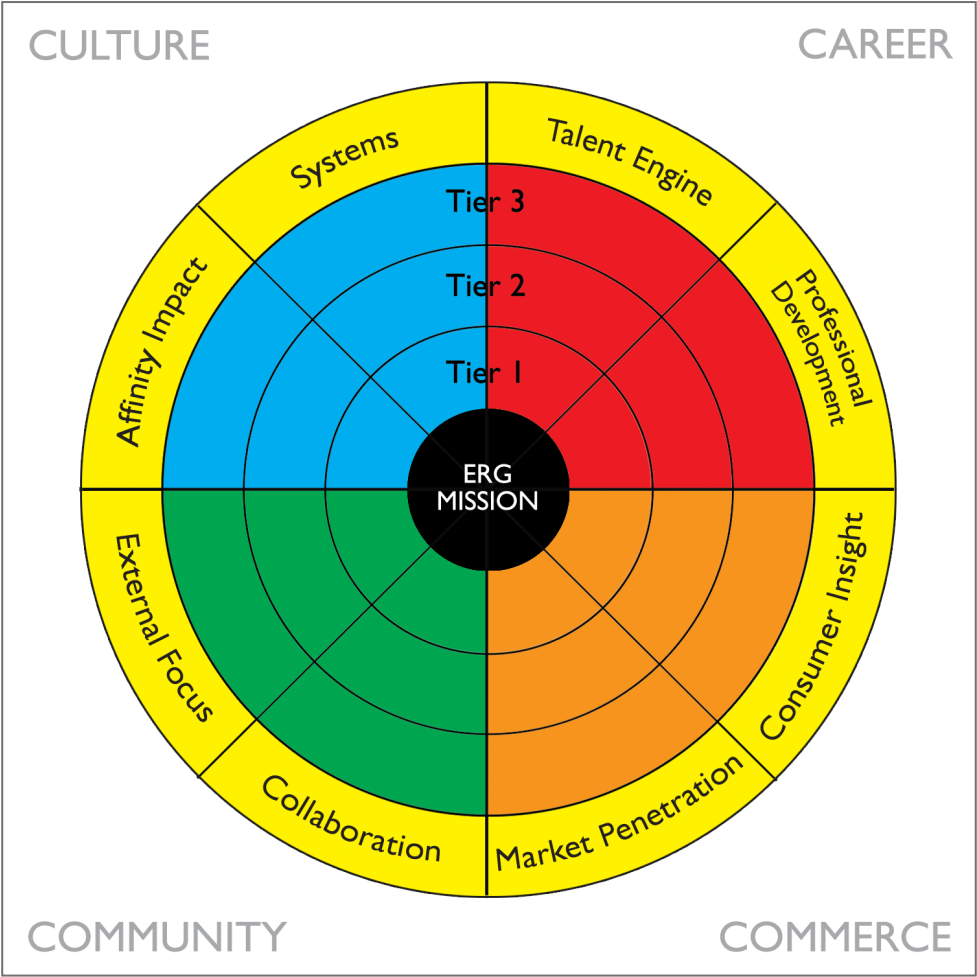


CLEO Chicago or CLEO Bay Area Member Companies

Each CLEO Bay Area and CLEO Chicago meeting has had between 60 – 90 Latino ERG members in attendance.

4C ERG Assessment

Each CLEO Chicago 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

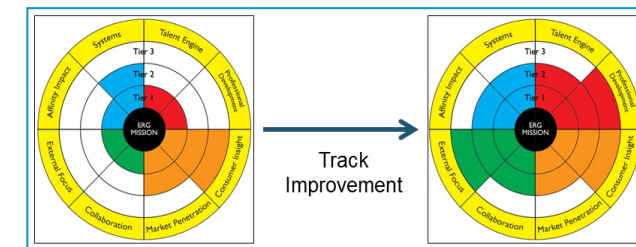
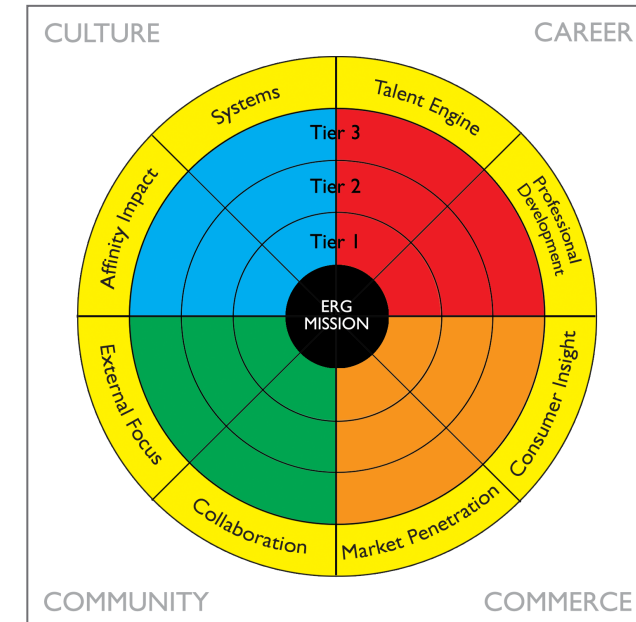
- The 4C Model provides a multidimensional perspective on ERG effectiveness. The model allows ERGs to assess their current health, impact and effectiveness.
- The model measures the impact and effectiveness of an ERG on 4 key holistic elements:

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 Chicago Member Requirements

All CLEO Chicago 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 Chicago quarterly meeting.
- Company agrees to keep CLEO Chicago member contact information in confidence and not share contact information with non-CLEO Chicago members.
- Company is encouraged to conduct the 4C ERG Assessment on their Latino ERG but it is not required.

CLEO Chicago Membership Benefits

Specific benefits for each CLEO member company

- 1) Ability to connect and benchmark with the leaders of Latino ERGs from numerous Chicagoland corporations.
- 2) Up to 4 employees from each CLEO Chicago member company are able to attend each quarterly meeting.
- 3) Contact information (name, company & email) to Latino ERG leaders for each CLEO Chicago member company.
- 4) A complimentary 4C ERG assessment of the Latino ERG of the CLEO Chicago 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 Chicago 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 Chicago meetings.

CLEO Chicago

Paid Membership Options

<ul style="list-style-type: none">Join CLEO Chicago anytime between January – December 2020.	<ul style="list-style-type: none">\$ 1,000.00<ul style="list-style-type: none">Covers CLEO Chicago membership through June 2021.
<ul style="list-style-type: none">Join both CLEO Chicago and CLEO Bay Area anytime in 2020.<ul style="list-style-type: none"><i>CLEO Twin Cities is free until June 2020</i>	<ul style="list-style-type: none">\$ 1,600.00<ul style="list-style-type: none">Covers both CLEO Chicago and CLEO Bay Area memberships through June 2021.

Questions

Contact if interested in joining CLEO Chicago or have questions regarding membership

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