



# CLEO Twin Cities

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 Twin Cities

## 2019 Launch

1

Launched in 2019, a new entity called the *Consortium of Latino Employee Organizations (CLEO)* was established in the Twin Cities. This new entity is called **CLEO Twin Cities**.

2

**CLEO Twin Cities** leverages the foundation established by Latino professionals in the Twin Cities that have gathered to share best practices for the past.

3

**CLEO Twin Cities** is a formalized & proven operation model. This operation model has been utilized successfully for the past 11 years by a similar group called CLEO Chicago & for the past year with CLEO Bay Area and was developed by Dr. Robert Rodriguez of DRR Advisors.

4

Since 2008, **CLEO Chicago** has successfully 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. **CLEO Bay Area** replicated the **CLEO Chicago** model and has resulted in a successful launch of in 2018.

5

Similarly, the objective of **CLEO Twin Cities** is to gather the leaders of Latino ERGs from top corporations in the Twin Cities on a quarterly basis to share best practices, network, find areas to collaborate and participate in professional development.

6

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

# CLEO Chicago

## CLEO Twin Cities is a Replication of the Successful CLEO Chicago Model

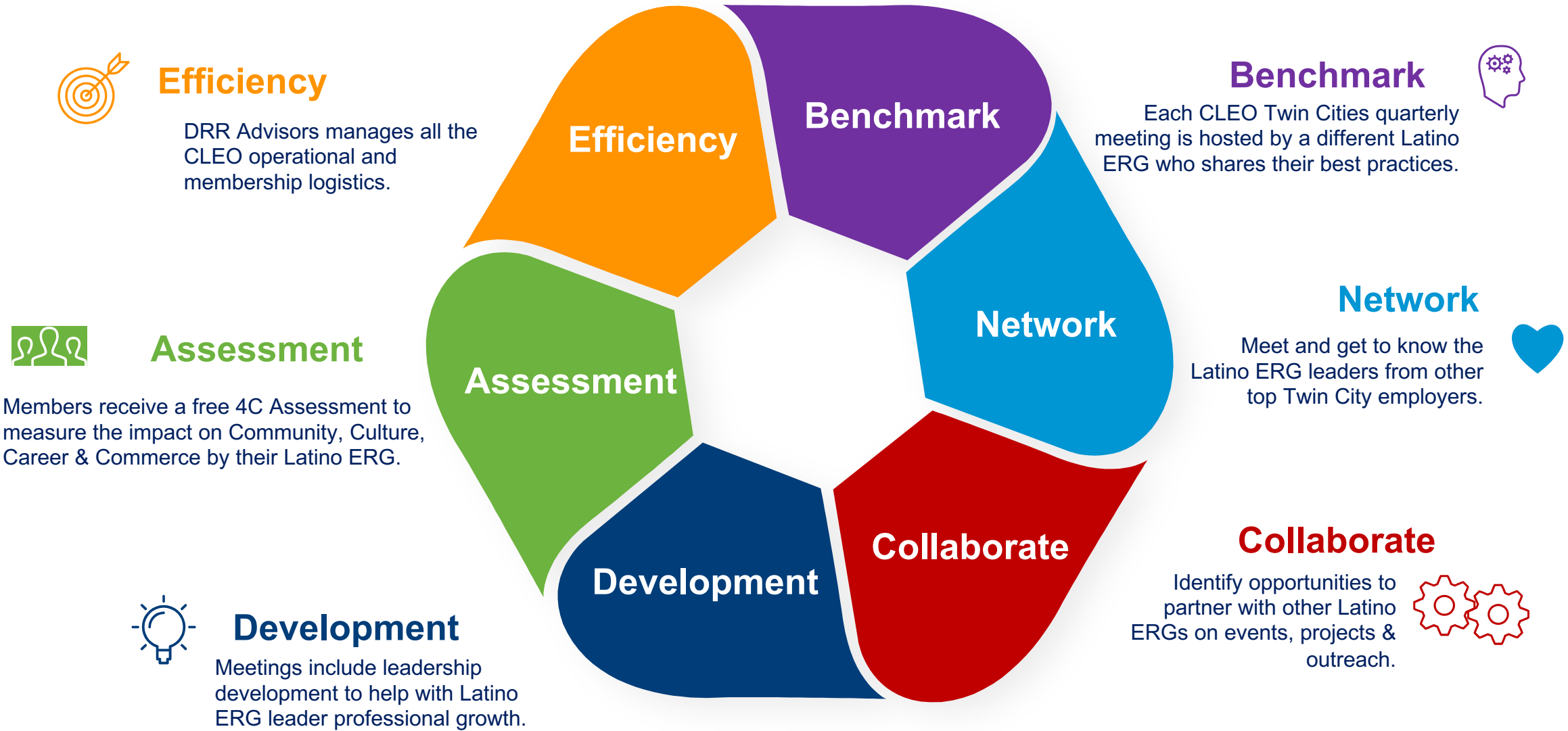
- DRR Advisors has successfully managed CLEO Chicago since 2008. Since then, the Latino ERG leaders of CLEO Chicago have met **every** quarter (close to 45 separate meetings) to benchmark and to address the most pressing topics Latino ERG leaders face.
- The goal is to replicate the operation and success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

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



# CLEO Twin Cities

Value Proposition



# CLEO Twin Cities

## 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.

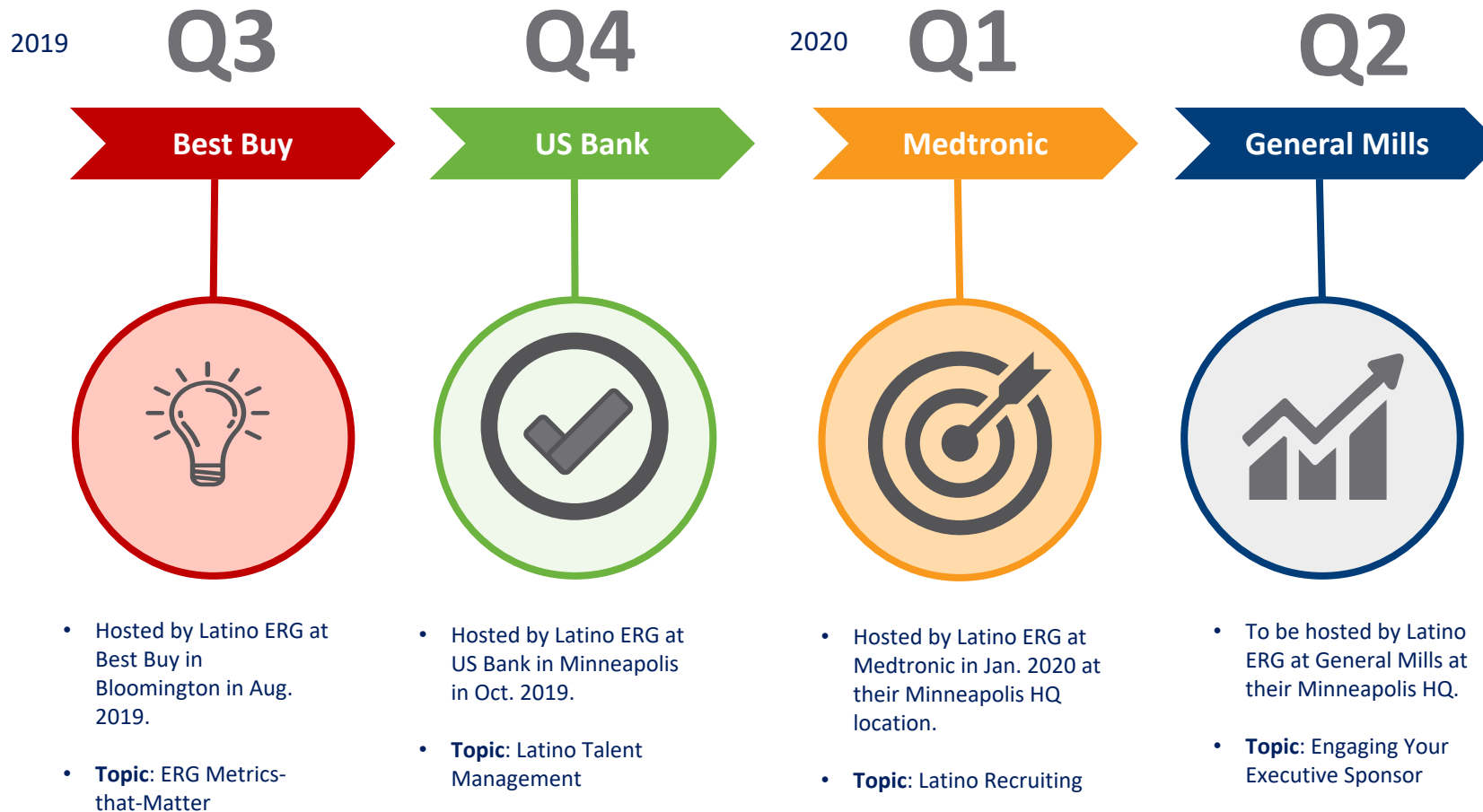


### Leader Development Topic (50 minutes)

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

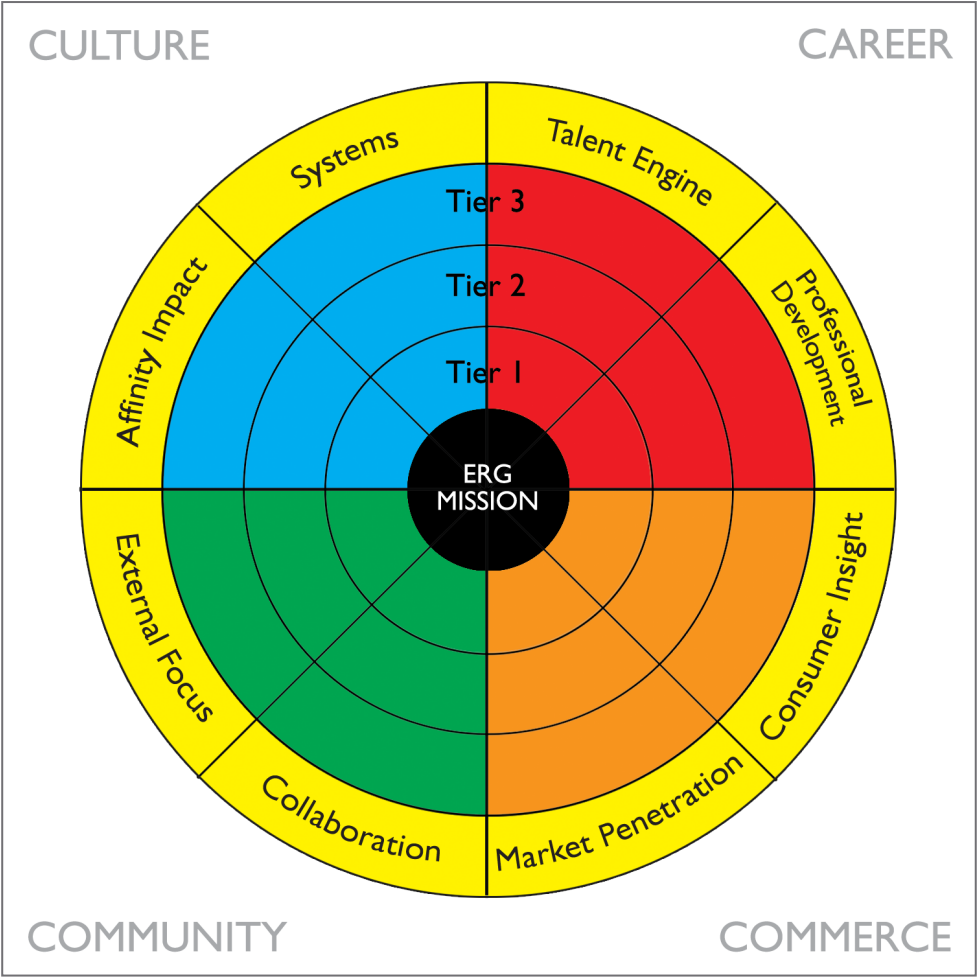
# CLEO Twin Cities Meetings

Quarterly CLEO Twin Cities meetings will be rotated between downtown Minneapolis, downtown St. Paul and suburb company locations



# 4C ERG Assessment

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



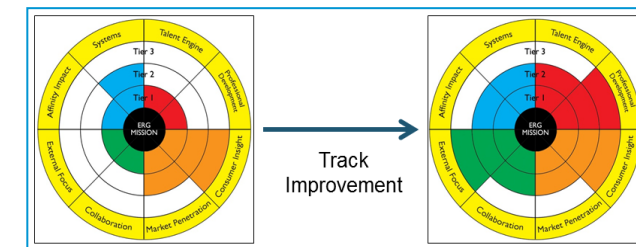
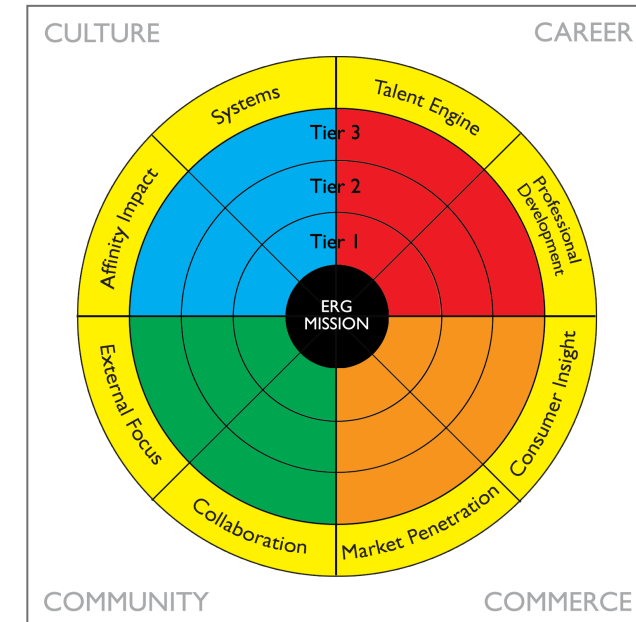
# 4C ERG Assessment

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:

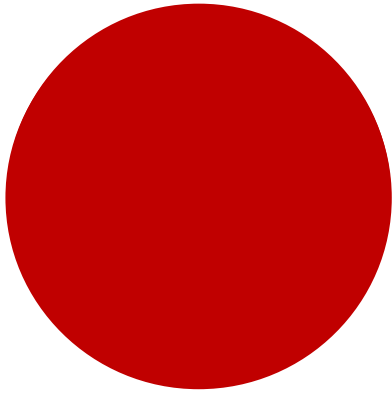
**C**ulture  
**C**areers  
**C**ommerce  
**C**ommunity

- 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 (50<sup>th</sup>–69<sup>th</sup> Percentile of ERGs)
  - Tier 2 Advanced (70<sup>th</sup>–84<sup>th</sup> Percentile of ERGs)
  - Tier 3 Strategic (85<sup>th</sup> Percentile of ERGs & above)
- ERG scores are captured on a visual circumplex which serves as a dashboard to gauge ERG progress.



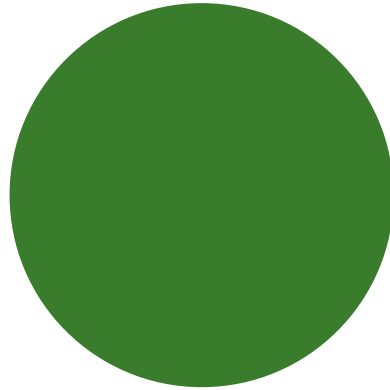
# CLEO Twin Cities Corporate Membership

The timeline for transition to a paid corporate membership model



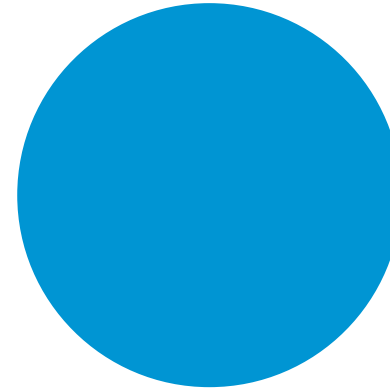
## Q3 2019

- Gain buy-in from local Twin Cities ERG organization.
- Replicate CLEO Chicago model.
- Host 1<sup>st</sup> CLEO Twin Cities meeting at Best Buy on Aug. 9<sup>th</sup>.
- CLEO meeting free of charge and open to all.



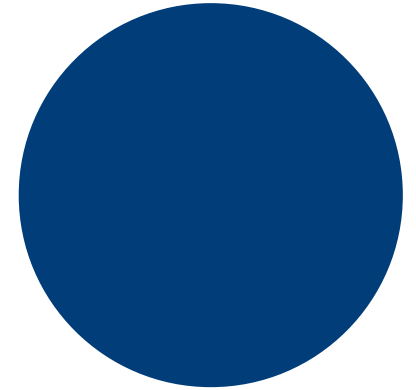
## Q4 2019

- Hold 2<sup>nd</sup> CLEO Twin Cities meetings at US Bank on Oct. 15<sup>th</sup>. Still at no charge
- Inform CLEO meeting attendees of upcoming transition to paid membership model.



## Q1 2020

- Hold 3<sup>rd</sup> CLEO Twin Cities meeting free of charge. Hosted by Medtronic in Jan. 2020.
- Outlined transition timeline to paid membership during Q1 quarterly meeting.
- Announce CLEO Twin Cities Q2 meeting host.



## Q2 2020

- Host a 4<sup>th</sup> CLEO Twin Cities meetings at no charge. To be hosted by General Mills.
- Outline membership plan and location for future CLEO Twin Cities meetings.
- Schedule 2 more CLEO Twin Cities meetings in 2020 in Q3 and Q4.

# CLEO Twin Cities Member Requirements

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



# CLEO Twin Cities Membership Benefits

Specific benefits for each CLEO member company

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

# CLEO Twin Cities

Pictures from first 3 CLEO Twin Cities hosted at Best Buy, US Bank and Medtronic.



# CLEO Twin Cities

## Paid Membership Options

<ul style="list-style-type: none"><li>Join CLEO Twin Cities by January 31, 2020</li></ul>	<ul style="list-style-type: none"><li>\$ 800.00<ul style="list-style-type: none"><li>Covers CLEO Twin Cities membership through June 2021</li></ul></li></ul>
<ul style="list-style-type: none"><li>Join CLEO Twin Cities anytime between February – June 2020.</li></ul>	<ul style="list-style-type: none"><li>\$ 1,000.00<ul style="list-style-type: none"><li>Covers CLEO Twin Cities membership through June 2021</li></ul></li></ul>
<ul style="list-style-type: none"><li>Join CLEO Twin Cities and either CLEO Chicago or CLEO Bay Area by January 31, 2020</li></ul>	<ul style="list-style-type: none"><li>\$ 1,400.00<ul style="list-style-type: none"><li>Covers CLEO Twin Cities membership through June 2021</li><li>Covers either CLEO Chicago or CLEO Bay Area membership through June 2021</li></ul></li></ul>
<ul style="list-style-type: none"><li>Join CLEO Twin Cities plus both CLEO Chicago and CLEO Bay Area anytime between February – June 2020.</li></ul>	<ul style="list-style-type: none"><li>\$ 1,600.00<ul style="list-style-type: none"><li>Covers CLEO Twin Cities membership through June 2021</li><li>Covers both CLEO Chicago and CLEO Bay Area membership through June 2021</li></ul></li></ul>

# Questions

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

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