

UPWARD SYNERGY'S

# ERG ACADEMY



2013 BROCHURE



# Mission & Signature Programs

Upward Synergy helps align Employee Resource Groups (ERGs) with their organization's key business goals and enhances a company's ROI.

We have partnered with the Center for Research on Employment and the Workforce (CREW) at California State University, Fullerton, a 501(c)3 nonprofit organization, and the University of California, Riverside. We are a “knowledge shop” that produces strategies, tactics and tools to boost ERG effectiveness.

Here we present a high-level overview of our Signature Programs that differentiate us – housed within the **ERG Academy** – where best practices meet fresh innovation.

## ERG ROI Study



We measure the Return-On-Investment (ROI) of ERGs in quantifiable dollar amounts

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## The ERG Toolkit



A research-based manual of best practices to develop ERGs

[More Information on Page 6](#)

## Executive Circle

An exclusive gathering of diverse executives to advance their organization's leadership pipeline



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## National ERG Summit

An event that convenes ERG leaders, champions and diversity advocates to share best practices



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# About Upward Synergy

## Our Mission

Upward Synergy helps align Employee Resource Groups (ERGs) with their organization's key business goals and enhances a company's ROI.

## Why the Name "Upward Synergy?"

1. An erg is a unit of energy.
2. Multiple ergs converge to generate synergy.
3. Like ergs, Employee Resource Groups (ERGs) converge across organizations to create upward synergy.
4. And Syn**ERG**y contains ERG.

Pictured Right: Cal State Fullerton, the most-diverse campus in the California State University System and UC Riverside, the most-diverse campus in the University of California System



# Leadership

## Executive Advisory Board

Our Advisory Board is comprised of executives from major *Fortune 500*-level corporations, privately held companies and governmental agencies, who are ERG executive champions and supporters. We list representative organizations here to illustrate the diversity of our board.

## Our Founding Advisory Board

We are constantly growing our Executive Advisory Board. Companies of our founding Advisory Board include:

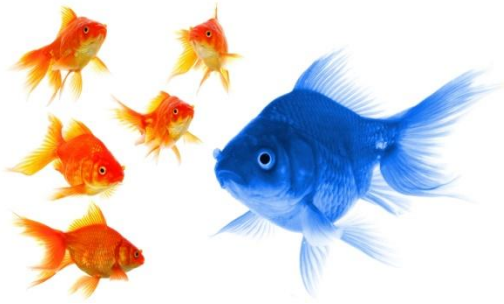
- Ernst & Young
- Northern Trust
- Northrop Grumman
- Raytheon
- SAIC
- State Farm
- Tosoh America
- Verizon

For more information about our Executive Advisory Board, visit [www.upwardsynergy.com](http://www.upwardsynergy.com)



# ERG ROI Study

Track ROI. Boost Strategy.



## Key Question

Beyond the anecdotal value of ERGs, what is the true business case and the dollar-based Return-On-Investment (ROI) of ERGs?

## What We Measure

The ERG ROI Study measures the dollar-based ROI of ERG efforts. It does so in the following ways:

- Talent Acquisition
- Talent Development
- Community Outreach
- Retention
- Corporate Cost Savings
- And more!

## Why Do We Measure?

To maximize:



### ROI

Identify the value of ERGs through quantifiable, dollar-based ROI



### Strategy

Learn how to leverage ERGs strategically



### Business Case

Highlight the business case for ERGs



### Potential

Optimize ERGs' potential and boost their ROI

## Case Example

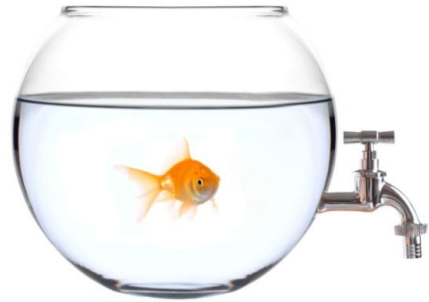
Even based on conservative figures, one *Fortune 500* company's ERGs demonstrated over a **1000% ROI** per year resulting from the efforts of the Employee Resource Groups.



# Executive Circle

## The Problem: The Executive's Dilemma

When executives are asked to be an ERG Executive Sponsor, they often are unclear as to what that role entails and how they can enhance the effectiveness of the ERG while ensuring it does not enter verboten arenas.



## The Solution: The Executive Circle

Our **Executive Circle** provides a forum for executives to discuss these issues and others. As part of the Executive Circle, participants will:

- Build networks
- Grow from leading-edge advice
- Mentor one another
- Share best practices
- Enhance their appreciation and understanding of issues facing women and people of color in the work place

Participants will be those involved in supporting and leading ERGs as executive sponsors or advisors.

# The ERG Toolkit:

## Leading-Edge Strategies, Tactics and Tools to Develop Your Employee Resource Groups

Employee Resource Groups (ERGs) continue to proliferate and grow within and across many companies. Beyond this, many ERG stakeholders dedicate valuable volunteer time, energy and heart to their companies. These ERG supporters range from leaders and members to Executive Sponsors and diversity practitioners. Despite this growth, there remain surprisingly few resources available that gather research-based, best tested practices, as well as leading-edge tactics.



*The ERG Toolkit* collects much of these strategies, tactics and tools in accessible and practical ways. The book helps ERGs channel and boost the effectiveness of their precious efforts. Filled with rich content, from broad strategies to specific, step-by-step processes; this book moves from the high-level to the tactical and practical. When optimized, ERGs can deliver over 1000% Return-On-Investment (and multiple times that!).

*The ERG Toolkit* augments ERG efforts toward these business-aligned goals. These include strategies and tactics to boost ERG efforts in:

- Recruitment
- Retention
- Talent Development
- Business Development
- Organizational Influence
- Strategic Planning
- Overall Effectiveness

# National ERG Summit

Upward Synergy's national signature event convenes Employee Resource Group leaders, champions and sponsors, as well as diversity advocates from major organizations, to share and learn best practices.

## 2013 Confirmed Summit Speakers

- **John Basile** | Vice President, Diversity & Inclusion Strategies, Fidelity Investments
- **Anthony P. Carter** | Vice President, Diversity & Inclusion, Johnson & Johnson
- **Thomas Culligan** | Senior Vice President, Business Development, CEO of Raytheon International, Raytheon Company
- **Ralph de Chabert** | Senior Vice President, Chief Diversity Officer, Brown-Forman Corporation
- **Daryl Dixon** | Chief Diversity & Equity Officer at Multnomah County, Owner at Diversity Resource Group
- **Manny Espinoza** | CEO, ALPFA (Assoc. of Latino Professionals in Finance & Accounting)
- **Veronica Gutierrez** | Vice President, Local Public Affairs, Southern California Edison
- **Christopher Henry** | Vice President of Talent & Organizational Development, MGM Resorts International
- **Tisa Jackson** | Vice President, Corporate Diversity & Inclusion, Union Bank
- **Dr. Andrea Lewis** | Chief Diversity and Inclusion Officer, BAE Systems, Inc.
- **Neddy Perez** | Vice President, Global Diversity & Inclusion, Ingersoll Rand
- **Sandra Quince** | Global Program Manager for Employee Networks, Diversity & Inclusion Organization, Bank of America
- **Ralph Reid** | Vice President, Corporate Social Responsibility, Sprint
- **Lorie Valle-Yañez** | Vice President, Chief Diversity Officer, MassMutual Financial Group
- **Nadine Vogel** | President & Founder, Springboard Consulting

*We are currently in the process of confirming many more esteemed speakers for 2013!*

## Past Summit Presentations

The 2012 National ERG Summit featured the following presentations and panels:

- Leveraging Affinity Groups for Business Success
- Creating Strategy & Mobilizing Change
- Selling Your Strengths
- Leadership Makes the Difference: Creating a Stairway for Success in ERG Top Performance
- Be Big, Be Bold
- Connecting the Dots: Aligning ERG Strategy from Recruiting to Business Development
- Value: ERG Best Practices & ROI
- Engage: How to Attract Executive Sponsors & Direct Supervisors to Support ERGs
- Pipeline: Paving the Path for Diverse Executive Leaders

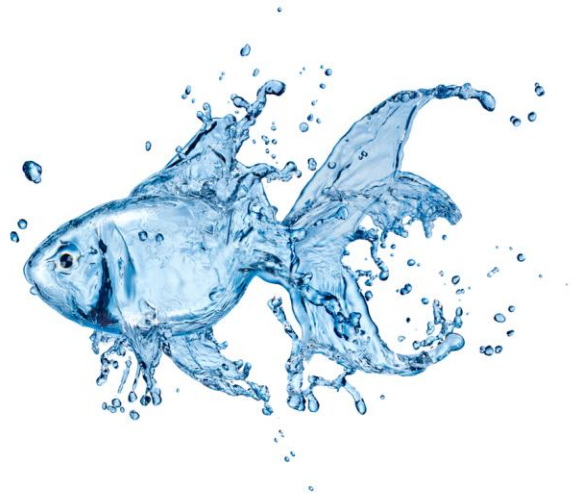




# National ERG Summit

## 2012 Summit Speakers

- **Kenneth J. Barrett** | Chief Diversity Officer, General Motors
- **Ken Bouyer** | Americas Director of Inclusiveness Recruiting, Ernst & Young
- **Chris Crespo** | Inclusiveness Director, Ernst & Young
- **Manuel Espinoza** | CEO, ALPFA
- **Sandra Evers-Manly** | Corporate Vice President, Corporate Responsibility & President of Northrop Grumman Foundation, Northrop Grumman
- **Gerry Fernandez** | President, Multicultural Foodservice & Hospitality Alliance
- **Sonya Gong Jent** | Vice President, Operations of Multicultural Business Development, State Farm
- **Bill He** | Vice President, Strategic Sourcing, Global Procurement, Kimberly-Clark Corporation
- **David Hinson** | National Director, United States Minority Business Development Agency, Department of Commerce
- **Tisa Jackson** | Vice President, Corporate Diversity & Inclusion, Union Bank
- **Donna Johnson** | Chief Diversity Officer, Master Card Worldwide
- **Jae Junkunc** | Vice President & Head of Strategic Risk, Mass Mutual
- **Daphne Kwok** | Executive Director, Asians & Pacific Islanders with Disabilities of California
- **Iesha O'Deneal** | Senior Vice President, Global Diversity & Inclusion Strategy, Consulting and Internal Initiatives Executive, Bank of America
- **Rosalyn Taylor O'Neale** | President, Leading from the Heart Consulting
- **Sharon Orlopp** | Global Chief Diversity Officer and Senior Vice President of Corporate People, Wal-Mart
- **Joyce E. Tucker** | Vice President, Global Diversity & Employee Rights, The Boeing Company
- **Mark Welch** | Senior Vice President and Global Chief Diversity & Inclusion Officer, Northern Trust
- **Sharon Wong** | Deputy Director of Diversity and Inclusion, White House Office of Personnel Management





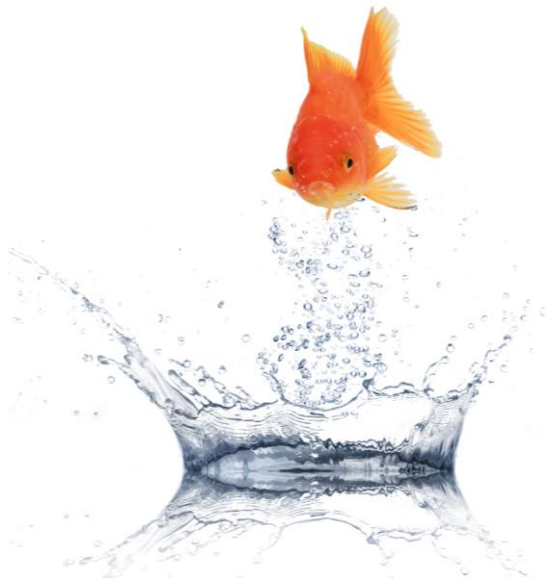
# National ERG Summit

## Benefits For Attendees

- Engage in a signature event that brings together ERG leaders from a diverse array of major organizations
- Share best practices of ERGs
- Gain research insights on ERGs
- Grow through our Executive Circle networking, training and mentoring – exclusively for executives
- Develop ERGs through Upward Synergy's primary programs
- Continuing Education credits available upon request

## Differentiators

- Executive Circle meetings to develop diverse, executive talent
- Senior-level, invitation-only speakers to ensure the highest learning quality
- ERG Return-On-Investment (ROI) research
- Integrated learning and research models unique to Upward Synergy
- Identification of Best Organizations for ERGs
- Conference-wide, interactive sharing and documentation of best practices
- Leadership and ERG learning—interwoven and practical



**Register Today!**  
**[www.ergsummit.com](http://www.ergsummit.com)**

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**For more information on Upward Synergy, visit**  
**[www.upwardsynergy.com](http://www.upwardsynergy.com)**



# National ERG Summit

**Innovate: The Future State of ERGs**



The 2013 National ERG Summit will be held on October 5<sup>th</sup> and 6<sup>th</sup> in Washington, DC, at the Gaylord National Hotel & Convention Center.

**Saturday | October 5, 2013**

7:00 AM – 6:00 PM Conference

**Sunday | October 6, 2013**

7:00 AM – 12:00 PM Conference

**Register Today!**

[www.ergsummit.com](http://www.ergsummit.com)

# Regional ERG Summit

Upward Synergy's Regional ERG Summit, an intimate version of our national signature event, convenes Employee Resource Group leaders, champions and sponsors, as well as diversity advocates from major organizations, to share and learn best practices.

## Propel: Accelerate & Innovate Through ERGs

ERGs present a prime opportunity to drive innovation, as they bring ideas outside of established work functions. These ideas come from their community involvement, cross-functional and multi-tier engagement within their own organizations, as well as across diverse populations. Innovation will arise through these diverse interactions, with ERGs at the nexus. In order for this to happen, we need to *Propel* our ERGs as we accelerate their development—which is the theme for the 2013 Regional ERG Summit.

The 2013 Regional ERG Summit will be held on July 26th in Riverside, CA, on the campus of University of California, Riverside.

## 2013 Confirmed Summit Speakers

- **Manny Espinoza** | CEO, ALPFA (Association for Latino Professionals in Finance and Accounting)
- **Brad Furukawa** | Vice President & CTO, Enterprise Shared Services, Northrop Grumman
- **Sean H. Gil** | Director, Career Center, UC Riverside
- **Tisa Jackson** | Vice President, Corporate Diversity & Inclusion, Union Bank
- **Greg Moore** | Regional Diversity Manager for North Texas, Space & Airborne Systems, Raytheon
- **Bryce Nakamori** | Manager, International Strategy & Supply Chain Capture & Proposal Execution, Space & Airborne Systems, Raytheon
- **Vu H. Pham, Ph.D.** | Managing Partner, Spectrum Knowledge, Inc.
- **Mark D. Settles** | Executive Coach, Former Diversity Recruiting Executive, JPMorgan Chase
- **Michael T. Spies** | Program Director, Common PDM program, Space and Airborne Systems, Raytheon
- **Suri Surinder** | Chief Operating Officer, ALPFA Institute

### 2013 Regional ERG Summit

Friday, July 26, 2013

9:00 a.m. – 4:00 p.m.

University of California, Riverside

**Register Today!**

[www.ergsummit.com](http://www.ergsummit.com)



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# Contact Us



## Contact Us!

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