

**City of Bend
City Manager Administrative Policy**



CITY OF BEND


EMPLOYEE RESOURCE GROUP ADMINISTRATIVE POLICY

Policy No. 2024-9

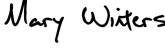
Bend Code Chapter 1.30.005 provides for 'City Manager Authority to Adopt Administrative Regulations, Policies and Guidelines.' All regulations, policies and guidelines adopted by the City Manager shall be consistent with the City of Bend Charter, the Bend Code, and council ordinances.

The following policy conforms to the above stated standards.

Authorized by City Manager:

DocuSigned by:

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Eric King, City Manager
Dated: 12/5/2024

Reviewed by Legal Counsel:

Signed by:

8B6252EA6CD44E1
Mary Winters, City Attorney
Dated: 12/5/2024

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I. PURPOSE

The City of Bend is committed to supporting workforce equity and inclusion by fostering the development of Employee Resource Groups (ERGs). The purpose of this policy is to define the authority, responsibility, accountability, and procedures for the formation and operations of City of Bend Employee Resource Groups (ERGs).

II. EMPLOYEE RESOURCE GROUP (ERG) DEFINITION

Employee Resource Group (ERG): A voluntary, City-recognized, employee-led group within the City organization. These groups aim to foster a diverse, connected, informed, and inclusive workplace by bringing together employees who share common identities, interests, or life experiences. ERGs should strive to provide support, create safe spaces, foster personal and professional development, and help identify organizational challenges and opportunities.

III. AUTHORITY

The City's Organizational Development & Employee Experience Manager (OD & EX Manager) has direct management, oversight authority, and responsibility for the policies, rules, and procedures for all City-recognized ERGs.

IV. SCOPE AND APPLICABILITY

This policy applies to all City employees (full- and part-time). Participation in an ERG is subject to supervisory approval. See Section "V. Policy and Procedure", subsection "e. Manager/Supervisor Approval" for more information.

Nothing in this policy is to be interpreted as prohibiting employees from joining or creating other types of groups. The City ERG program is not intended to replace existing departmental diversity, engagement, respect, or affinity teams.

V. POLICY AND PROCEDURE

ERGs must be committed to fostering a sense of community and belonging, helping to introduce new and current employees to the organizational culture, and providing networking, mentoring, informational, and professional development opportunities.

A. ERG Approval Policy

1. The OD & EX Manager oversees both the initial and the annual approval process of ERGs.
2. The initial approval process for a new ERG includes:

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- a. A completed ERG application filed with the Employee Experience (EX) Steering Committee.
 - b. An Executive Sponsor who has reviewed and approved the application.
- 3. Approval will be based on an assessment of:
 - a. Stated goals and objectives, which should have a clear connection to the City's mission, core values, organizational outcomes, and/or initiatives.
 - b. A work plan that describes the activities listed in Section V. "Policy and Procedure" subsection C. "ERG Formation and Activities."
- 4. All requests will be considered on an individual basis. Recommendations for approval or denial will be made by the EX Steering Committee and submitted to the OD & EX Manager for final decision.

B. ERG Annual Review and Approval

- 1. The EX Steering Committee will conduct an annual review of all ERGs to ensure that the goals and objectives of each ERG continue to contribute to the City's mission, values, and organizational outcomes.
- 2. Established ERGs are responsible for submitting an annual workplan and report at the beginning of each calendar year.
 - a. Annual work plans must contain the following:
 - i. The group name, the group's defined membership (if applicable), and the group's goals and objectives for the coming year.
 - ii. A clear connection to the City's mission, core values, organizational outcomes, and/or initiatives, and how the group's activities will support those efforts.
 - iii. A list of the group leadership team and a roster or count of participants.
 - iv. Review and approval from the ERGs Executive Sponsor.
 - b. Annual reports must contain the following:

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- i. A summary of completed activities for the prior year, including a description of how any City funding was used to support these activities.
- ii. An update on progress made toward the prior year's workplan, including any hurdles or challenges that prevented the group from completing their goals.

C. ERG Formation & Activities

1. Formation

- a. ERGs must be in alignment with the values, mission, and policies of the City.
- b. Groups are organized by employees who support the goals of the ERG and wish to participate in its activities. Groups are responsible for outreach and recruitment of members; the City will not provide any employee information related to ERG outreach and recruitment. ERG leadership is encouraged to work with their Executive Sponsor and the OD & EX Manager to strategize on recruitment and appropriate use of the City's existing internal communications channels.
- c. Membership may be defined, but ERG events must be open to any City employee who wishes to attend. Groups wishing to define membership should coordinate with the OD & EX Manager to create a membership definition which will be included in their application and communication.
- d. ERGs shall have a Leadership Team comprised of a Chair, Vice-Chair, and Secretary, which will function as the organizing body for the ERG. Further information on these positions can be found in Section IV. "Roles and Responsibilities" subsection A. "ERG Leadership".
- e. ERGs should be formed as prosocial groups, meaning that they are intended to promote behavior that benefits others or society. To this end, ERGs may not form or evolve for the purpose of opposing other ERGs.
- f. Should there be a situation in which an ERG is being discontinued, formal notice will be communicated in writing to the ERG Leadership Team by the OD & EX Manager. Although the City intends ERGs to be employee-driven organizations, the City

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reserves the right and sole discretion to discontinue any ERG at any time, for any reason.

2. Guidelines

a. ERGs are not bargaining units and do not represent employees or groups of employees in issues related to terms and conditions of employment or in any matter related to collective bargaining.

b. ERGs may not seek remedies for individual employee matters and do not have any status or role in personnel or performance management, discipline, investigations, or any related topics.

c. Participants of an ERG may not conduct themselves in any manner that would suggest that they speak for the City, represent the policies or positions of the City, or have authority to bind the City in any way.

d. ERGs may not engage in political advocacy in violation of state law or other applicable rules, including those that prohibit public employees from engaging in political activity while on the job during working hours. ERGs and ERG members with questions or concerns about limits on political advocacy should consult with the OD & EX Manager and/or the City Attorney's Office.

e. State and federal law prohibits government (such as the City) from the establishment of religion. Governments must pursue a course of neutrality, favoring neither one religion over another nor religion generally to non-religion. As a result, no ERG may be organized for the purpose of advancing or opposing any religion or religious viewpoint nor may any ERG engage in religious or worship activity. Employees are free to worship as they please and may create and participate in groups associated with a religious belief or background, but those groups will not be recognized as ERGs under this Policy.

f. All ERG activities must be in compliance with the City of Bend Employee Handbook and all other City policies and procedures.

3. Activities

a. ERG activities may include the following:

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- i. Identifying workforce engagement barriers and solutions.
- ii. Helping the City with diversity, equity, and inclusion awareness.
- iii. Hosting events that give ERG participants and employees opportunities to network, develop skills, and further personal and professional growth.
- iv. Helping the City with strategic planning, recruitment, employee development.
- v. Sponsoring events, trainings (i.e., Lunch & Learns), seminars, and conferences that align with the scope and goals of the ERG (subject to EX Steering Committee and City Manager or designee approval).
- vi. Taking on special initiatives and projects.
- vii. Celebrating cultural, educational, and other special events.
- b. ERG activities should be accessible to the greatest extent possible. Time, location, and cost should be taken into consideration when planning activities.
- c. ERG activities that are strictly social are expected to be scheduled outside of regular working hours for the majority of membership. Employees should only participate in strictly social ERG activities during non-work time.

D. Employee Participation

Participation in an ERG is voluntary and open to all City employees who have submitted the ERG Participation Form and received supervisory approval. Criteria and conditions for participation include:

- 1. The ERG Participation Form should be maintained by the employee, employee's supervisor, and the ERG Secretary.
- 2. When requesting to participate in an ERG activity on work time, employees shall request prior approval from their manager/supervisor in order to allow managers sufficient time for adequate coverage. Participation may not produce any overtime obligation, either for the participating employee or for any other employee.

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3. With prior supervisory approval, ERG participants may spend up to 2-hours per month on City working time on ERG business, and employees in approved ERG Leadership Team positions may spend up to 4-hours per month on City working time on ERG business, as long as it does not interfere with the regular work of employees and does not result in overtime. While on City working time, activities and behaviors are expected to align with the City of Bend Employee Handbook, applicable Collective Bargaining Agreements, and City policies. Allotted hours include any commute times.
4. Citywide workgroups and attendance at citywide sponsored events are not included in time allotted for ERG participation.
5. ERG members, including those in leadership positions, are responsible for ensuring that they do not exceed the hours allotted under this Policy for ERG activities.
6. Beyond what is outlined in City policy, it is up to the ERG Leadership Team to define within the ERG what constitutes a violation of any group agreements for ERG participants. Members and participants in ERG meetings and events are expected to follow the agreed upon group agreements. The goal of this is to allow ERGs to have a structured way to work out any conflicts among its members. The ERG Leadership may request consultation from the OD & EX Manager or Human Resources Department as necessary or desired.
7. An employee's active participation in a City ERG may be noted in their annual performance evaluation as part of their personal and professional development progress.
8. In the case of policy violation or other extreme circumstances, an individual's membership in an ERG may be removed by the City, in the City's sole discretion. This will be handled on a case-by-case basis. The OD & EX Manager will notify the ERG Chair and Secretary to remove the employee from their roster once notice has been given to the employee.
9. Employees may voluntarily discontinue their participation in an ERG at any time by emailing the designated ERG Leadership Team.
10. Employees do not have any expectation of privacy regarding their participation in ERGs or ERG activities, which will be conducted transparently and reflect the City's values of accountability, integrity, and respect.

E. Manager/Supervisor Approval

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Managers and supervisors should encourage and support participation in ERGs. Managers and supervisors are encouraged to work with employees who are interested in participating in an ERG by allowing employees to adjust their schedules by flexing their time, while ensuring the employee is able to meet the expectations of their position.

1. ERG participation is subject to manager/supervisor approval. ERG participation will not be approved if the operational needs of the department will be impacted and/or if ERG attendance would result in any overtime for the employee.
2. At no time is an employee required to notify their supervisor of which ERG they are participating in as a condition of approval.
3. If the employee's request is denied, the manager/supervisor shall provide a reason to the employee, which should include an explanation of how the department operational needs preclude the employee's participation, if applicable.
4. The employee and/or manager/supervisor may request consultation with the OD & EX Manager or Human Resources Department at any time regarding any aspect of employee participation in an ERG, a decision to approve or deny participation, or any aspect of this Policy.
5. Employees that disagree with their supervisor's decision should reach out to the OD & EX Manager to discuss how to move forward.

F. Communication

1. ERGs may use City communication systems for ERG business, for example, to notify participants of meetings, events, meeting actions, or distribute minutes. ERGs and participating employees have no expectation of privacy regarding any use of City systems. All records related to ERGs and ERG activities will generally be considered public records subject to retention and disclosure requirements of state law.
2. Citywide communications are to be coordinated with the OD & EX Manager and Internal Communications for distribution. City-wide communications will be subject to approval from the City Manager or designee.
3. ERGs may use City conference rooms for the purpose of regular meetings with appropriate coordination.

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G. Funding and Reimbursement

Established ERGs will receive equal funding each fiscal year. The OD & EX Manager is responsible for tracking the budgets and approving expenditures and payment for all ERGs and will maintain a line item in the budget for ERG use.

1. Groups are responsible for ensuring that all expenditures are within the allowable guidelines.
2. When requesting purchases or reimbursements:
 - a. ERGs must submit the request with complete details to the OD & EX Manager via the form established by the ERG Program.
 - b. Status of the request and payment options, consistent with procurement rules, will be communicated to the requesting ERG within thirty (30) days following receipt of the request.
3. ERGs may not charge membership dues.

VI. ROLES & RESPONSIBILITIES

A. ERG Leadership Team

As a collective, the ERG Leadership Team is responsible for the development of the group's annual work plan, annual report, and for the development of the roles and responsibilities of the ERG Leadership Team beyond what is required in this policy. ERG Leadership Team positions are elected by the membership of the ERG in a fashion designed and maintained by the group. Contact information for each ERG Leadership Team position must be up-to-date with the OD & EX Manager and available for interested staff. The ERG Leadership Team is responsible for the following:

1. Ensuring sufficient membership. The ERG must maintain at least five active members (including those in the ERG Leadership Team) unless and approved exception has been granted.
2. Set meetings and activities, including frequency, location, purpose, and content.
3. Submission of the group's annual report and work plan to the EX Steering Committee.

ERG leadership will consist of the following roles, defined in general terms as:

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Chair	<p>Leads in driving activities to meet goals.</p> <p>Delegates roles of the ERG.</p> <p>Serves as the face of the ERG when interfacing with City Leadership.</p> <p>Serves in an advisory capacity when term is over.</p>
Vice-Chair	<p>Assumes above responsibilities in the absence of the Chair.</p> <p>Supports the Chair in leading the group and achieving goals.</p> <p>Monitors the budget for scheduled events / activities (I/A)</p>
Secretary	<p>Records meeting attendance.</p> <p>Records meeting minutes.</p> <p>Facilitates ERG publicity.</p> <p>Maintains the ERG roster.</p>

B. ERG Executive Sponsor

Executive Sponsors are expected to be at least a director level or their designee within the organization.

1. Support the success of the ERG by assessing institutional barriers to participation or progress.
2. Mentor the ERG Leadership Team.
3. Advocate for the ERG at the Executive level.
4. Help ensure appropriate resources are available for the group.
5. Regular communication with the Chair/Vice-Chair.
6. Other responsibilities that the Executive Sponsor and ERG Leadership Team agree to.

Employees seeking to establish a new ERG who have questions or concerns about obtaining an Executive Sponsor should contact the OD & EX Manager.

C. Organizational Development & Employee Experience Manager (OD & EX Manager)

1. Draft and maintain policy and resources related to ERGs.
2. Provide consultation to employees seeking to start an ERG.
3. Correspond regarding application approval, annual reporting, and recertification.

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4. Identify any deficiencies that preclude recertification of an ERG for each year after approved formation.
5. Provide consultation to City Leadership, departments, and/or divisions regarding employee participation in ERGs as needed.
6. Coordinate and converge ERG Leadership Teams as needed.
7. Facilitate discussion and approval recommendations of the EX Steering Committee.

D. Employee Experience (EX) Steering Committee

1. Provide feedback and recommendations on proposals to form new ERGs.
2. Review annual workplans and reports submitted by each ERG.
3. Make recommendations for the approval process and policy for ERGs.
4. Review any identified deficiencies that preclude recertification of an ERG and provide recommendations on remedies or discontinuation.
5. Review recommendations from ERGs on City policy, procedure, or support. Craft responses and forward as appropriate to other City entities.

E. Equity Department

1. Appoint a representative from their leadership team to serve on the EX Steering Committee.
2. Provide consultation to departments, and/or divisions regarding employee participation in ERGs as needed.
3. Provide consultation on ERG policy and process as needed.
4. May act in a support, consultancy, or sponsor role for groups.

F. Human Resources Department

1. Appoint a representative to serve on the EX Steering Committee.
2. Provide consultation to departments, and/or divisions regarding employee participation in ERGs as needed.

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3. Provide notification to the OD & EX Manager of any substantiated violations that would discontinue an ERG or an individual's participation in an ERG.
4. Provide consultation on ERG policy and process.



Accommodation Information for People with Disabilities

To obtain this information in an alternate format such as Braille, large print, electronic formats, etc., please contact Amanda Toms at atoms@bendoregon.gov or 541-323-8562. Relay Users Dial 7-1-1.