



Great Place To Work[®] **For All Summit[™]** **Las Vegas 2025**

Welcome to the new business as usual.

From Ideas to Initiative - Project Planning for ERGs

Presenters: Kelly Chan, Yolanda Valdivia
UKG
April 8

Agenda

01 Introductions

02 ERG Planning Framework

03 Interactive Audience Planning Walkthrough

04 Q&A

01

Introductions



Kelly Chan

Belonging, Equity, and Impact Program Manager at UKG

Kelly Chan has been at UKG for 8.5 years holding various roles, but her passions led her to become one of the co-founders and former co-chair of AsPIRE (Asians and Pacific Islanders Raising Equity) Employee Resource Group (ERG). They played a pivotal role in fostering intersectionality, collaboration, and cultural celebration across the organization.

Now a key member of the Belonging, Equity and Impact team, they help to support the Employee Resource Group Program by onboarding and developing ERG leaders, driving impactful initiatives, providing resources and training, and partnering with teams such as marketing and global communications to amplify equity and inclusion across UKG. Kelly's expertise spans program development, leadership training, and strategic collaboration, helping ERGs drive meaningful change.

Originally from Stockton, California, she now resides in Long Beach, California with her husband and two fur children (Salem Moon and Nacho Sun).

Yolanda Valdivia

Sr. Service Enablement Manager at UKG and a Co-Chair of Unidos ERG

Yolanda Valdivia has been an integral part of UKG for 7.5 years, during which she has embraced various roles across the organization. Currently, she plays a vital role in supporting implementation methodologies and teams within the Customer Experience organization.

As a founding member of UNIDOS (meaning "united" in Spanish), an Employee Resource Group (ERG), she has served in a leadership or Co-Chair capacity for the past three years. Yolanda is dedicated to empowering members to express their voices confidently. The group's mission focuses on creating networking and development opportunities, fostering impactful conversations, and nurturing a vibrant community in a supportive and uplifting environment.

Originally from California, Yolanda now resides in Indianapolis, Indiana, where she enjoys life with her two beloved fur babies, Oliver and Aramis, alongside her husband, Brant.



02

ERG Planning Framework

ERG Planning Framework



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graph LR; A[Ideation] --> B[Requirements]; B --> C[Delegate]; C --> D[Execute]
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Ideation

Requirements

Delegate

Execute

Ideation

Supporting Your Goals

Events are great for bringing members and non-members together, in addition to raising awareness about who and what your ERG stands for. They allow you to do something fun and educational, as well as provide a safe place to have some of the more challenging and difficult conversations. During the planning stages for any program and event idea, can you identify how it supports not only your mission but the strategic pillars too?

- Alignment with the ERG's Vision and Mission, and the overall business goals
- What are the priorities
- Who, what, when, and where?



Requirements Gathering

With every event or initiative, there will need to be a check list of operational assets. Be sure to understand what items are needed to help support your event.

- **Outline Requirements for your event/initiative**
 - **Budget Considerations**
 - **Virtual or in Person**
 - **Accessibility**
 - **Communication Strategy**
 - **Stakeholders**
 - **Timeline**
 - **Tools**



Delegate

“More hands make light work!”

Delegating the workload to your stakeholders and ERG Team Members to execute on an event or initiative is going to be a critical step to ensure that everyone involved understands where support is needed

- **Gather your stakeholders and Team Members**
- **Delegate task to team members**
- **Determine meeting cadence, internal communication norms**
 - **Check-ins to get status updates**



Execute

Once you have the idea(s), requirements, and team knowing where they will be supporting, it's time to share your initiative/event out to your members.


- Send out communication
- Make sure AV is setup
- Make room(s) are reserved
- Meeting invites sent
- Facilitator
- Payment has been dispersed



UNIDOS- Heritage Month Events


Speaker Series

Sylvia Acevedo




Leadership Cafecito

with Rachel Barger




CAFECITO TIME




Fireside Chat

with Gaby López




Weston Chapter's Hispanic Heritage Month Happy Hour



Financial Literacy

with Ileana Musa





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HISPANIC & LATIN* HERITAGE MONTH

LET'S CELEBRATE THE CULTURES THAT SHAPED OUR STORY!



UNIDOS

UKG

Solutions Customers Resources About Us

LIFE AT UKG

Celebrating Hispanic Heritage Month: Voices from UNIDOS

Embracing diversity, unity, and resilience with three U Krewers from UKG's Hispanic-Latin* employee resource group.

HISPANIC & LATIN* HERITAGE MONTH

LET'S CELEBRATE THE CULTURES THAT SHAPED OUR STORY!





03

Interactive Audience Planning Walkthrough

Prompt:

**Your ERG wants to plan a
Professional Development
event for July**



About Us



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Thank You

Got questions? Feel free to ask away!

Resources:

The UKG ERG Playbook | UKG

This playbook provides a roadmap for proving the value of ERGs to your organization and an overview of how to roll out and grow an ERG program.



What Are Employee Resource Groups (ERGs)? | UKG

Read our blog that shares the importance and value of Employee Resource Groups at any organization.



Stories with Purpose Interactive Experience | UKG

Dive into our book collections and discover real stories about how our belonging, equity, and impact approach is creating opportunity for all people and organizations to thrive.



External Guest Speaker

Agency Resources

- All American Entertainment Speakers (AAE)
- The Harry Walker Agency (HWA)
- National Speakers Bureau
- A-Speakers

