

CASE STUDY: ATB Financial



Women's ERG Journey from Grassroots Group to Change-Oriented Network

COMPANY OVERVIEW

ATB Financial, a leading Alberta-based financial institution, is driven by a clear purpose: "We Exist to Make it Possible". This statement embodies the way the organization works, how it interacts with clients and team members, and its overall vision and strategy. ATB's purpose is forward-facing; instead of focusing on how things currently are, it is focused on what is possible. Recognizing that its purpose

must be implemented by daily value-driven action, ATB is committed to living by four main values or its "ATB ID": being Client Obsessed, Champions of Belonging, Driven to Perform, and One ATB.

As "Champions of Belonging", ATB puts a strong emphasis on diversity, inclusion, and belonging (DIB) both inside the organization and in the communities it serves. Since 2020, ATB has had an internal Inclusion & Reconciliation team who work to create a culture of belonging and ensure its inclusive and equitable values are embedded into practices, culture, and activities across all functions of the organization.

ATB ID: Champions of Belonging

Diversity is the lens through which we recognize and realize future possibilities. We enable equity, practice inclusion, attract and retain the brightest and best, and foster innovative, independent thought.

Behaviours:



CELEBRATE DIVERSITY



ENABLE A CULTURE OF INCLUSION



**BUILD SAFE AND
EQUITABLE SPACES**



**BRING OUR WHOLE
SELVES TO WORK**

ELLEVATE: ATB'S WOMEN'S EMPLOYEE RESOURCE GROUP (ERG)

As part of efforts to integrate the ATB ID values across the organization, ATB currently operates nine employee resource groups (ERGs). **Ellevate, its women's ERG, has over 1,700 community members and is one of the longest-standing and largest ERGs at ATB.** Ellevate supports ATB's forward-facing vision in envisioning what a fully inclusive and empowered world could look like for women and gender-diverse team members. To maximize impact, drive organization-wide change, and ensure employee buy-in, Ellevate's strategic vision and objectives are closely aligned with ATB's Inclusion & Reconciliation Strategy.

Ellevate's initiatives include implementing an organization-wide mentorship program and shadow program, hosting events such as "Women in..." panel series (highlighting stories of women in teams within ATB where women are underrepresented in the pipeline), International Women's Day initiatives, operating a book club focused on intersectional feminist readings, running educational workshops for women on topics such as leadership skills and participation on boards. It also partners with other ERGs, such as collaborating with the Indigenous network for Red Dress Day initiatives and with ATB's Movember team to spotlight men's health during November.



Ellevate's Journey: From Grassroots Group to Change- Oriented Network

Established in 2013, Ellevate began as an informal gathering of passionate women leaders in the organization. Over the years, the network has grown and matured significantly as membership grew, support increased from senior leadership, and ATB's organizational commitment to inclusion and belonging formalized. In 2023, Ellevate has transformed to include a leadership team of 17, managing seven working squads and four ongoing programs which are all developed during an annual full-day of business planning.

With its start as a small grassroots movement, Ellevate recognizes the social perception that existed, particularly at the beginning of its operation, of the group being a trivial "social committee" or "just a bunch of women complaining". **To build reputational credibility, break gender-based stereotypes, and create tangible change, Ellevate has worked to dismantle these perceptions and reframe their work** from "volunteer work" to legitimate and valuable work. It has done so by aligning Ellevate's initiatives



with ATB's overall DIB strategy, allotting dedicated spots for ERG Leaders in ATB's annual President's League Award celebrations, and encouraging leaders to include a professional Ellevate-related goal in their annual performance planners.

Through these years of growth, it prioritized **the importance of male allyship** and intersectionality. Understanding that change cannot be achieved with only one piece of the equation and hearing that these spaces are often seen as "only for women", Ellevate began actively looking to engage male allies through the ATB community. Currently, Ellevate has formed a male allyship squad that works to create avenues to engage men in Ellevate's mission and work. As the organization continues to learn more about the concept of gender and recognizes the diverse experience of individuals, it has taken an intentional intersectional approach in its activities. As an example, as part of its Book Club, a separate panel discussion was planned in partnership with ATB's Pride Network and Trans Collective to discuss the book through the perspective of non-binary and trans team members.

As Ellevate continues to mature, its goals and objectives continue to advance. Its vision for 2024 and beyond is to **evolve from an event-oriented network to a change-oriented network** through advocacy and courageous conversations. It hopes to exist as a model for other ERGs (both within and outside of ATB) of what growth can look like for more mature ERGs that are looking to take their work to the next level.

Tips from ATB: Starting and Growing ERGs

For companies with no existing ERGs, start simple and focus on key priorities:

- Developing policies on how to create and start an ERG and what qualifies as an ERG.
- Developing governance documents on how the ERG should be run. This does not need to be too prescriptive but should have enough guidance for early members on what activities are required to get started and maintain the network.
- Sharing clear communication on how the organization can support, including financially and with executive sponsorship.
- Start building ERG initiatives into the organizational culture by inviting members to speak at company events and through internal marketing, outreach and engagement.

For companies who have established ERGs but want to expand and grow their impact, focus on maximizing the benefits of existing supports and resources:

- Increase resources and support where possible such as aligning efforts with internal marketing teams, creating an executive sponsorship council, and ensuring consistent financial support on an annual basis.
- Provide structure while maintaining grassroots sensibilities, balancing top-down and bottom-up support.
- Maximize utilization of ERGs by having a pulse on employee feedback and existing organizational DEI strategy, and aligning efforts with these focus areas.
- Be open to feedback from employees and invite folks to the table to provide input on creation of new programs and events, proposed policies, etc.
- Recognize and reward the work and contributions of ERG members and leaders through channels that are visible within the company.

KEY SUCCESS FACTORS

Key success factors that led to ATB's Women's ERG successful growth journey:

INTENTIONALLY DEVELOPING STRATEGY AND GOALS THAT ARE ALIGNED WITH INTERNAL DIB STRATEGY.



FOCUSING ON BUILDING REPUTATIONAL CREDIBILITY AND HIGHLIGHTING THE VALUE OF ERG WORK.



CREATING PARTNERSHIPS WITH OTHER INTERNAL TEAMS AND GROUPS TO AMPLIFY MESSAGING, INCREASE EMPLOYEE ATTENDANCE AND INTEREST, AND INCORPORATE DIVERSE PERSPECTIVES.



UNDERSTANDING WHAT IS BENEFICIAL TO ATB TEAM MEMBERS AND BEING HYPER-FOCUSED ON THOSE ACTIVITIES AND ITEMS.



IMPACT

Over the years, Ellevate has evolved from an informal gathering of women with one-off events to become a robust and organized network focused on creating systemic change across the organization. By focusing on implementing large-scale initiatives, creating intentional spaces for change, and working collaboratively with other teams and departments, it has contributed to changes in organizational practice, programs, and culture. Examples include:

Mentorship Program: Understanding that mentorship is a huge contributor to professional advancement, Ellevate piloted and ran three cycles of one of the largest mentorship programs at ATB. The program was open to both women and men and participants could connect with a mentor, a mentee, or simply make a peer connection. The program has since been picked up by ATB's People & Culture team and operationalized across the organization, solidifying the influence of Ellevate at ATB and its ability to affect real change within the company.



“Ellevate has helped me to be a more mindful leader. I’m able to take a lot away from this group and back to my team, helping to foster a safe and supportive team environment.”

- (ERG Member)



Shadow Program: An ongoing program that pairs women across the organization with a host in a specific area of the business. Within one or two sessions, the host will walk their shadowee through a day in the life of their role at ATB. In 2023, Ellevate matched over 40 women with a host in their desired team or department. This has empowered women at ATB to learn more about the organization as a whole and in functions they may not interact with regularly, which can lead to increased opportunities for career development.

Communication and Community-Building: Monthly, Ellevate chooses a unique topic and creates weekly content surrounding the topic which is posted on ATB's intranet channel. Previous topics include parental leaves, gender bias in data and AI, equality vs. equity, male allyship, the pay gap, and women in politics. In ATB's fiscal year 2023, online engagement grew as Ellevate focused on intentionally creating content that its community had interest in and actively engaged with:

100

content posts created
(from both curated and
community content)

1,972

post likes

19,091

site views

“Ellevate has shown me that this work is not as simple as a ‘lunch and learn’ or ‘coffee chat’ thing, it is a movement and shift in mindset where one day having to draw attention to oppression will be a thing of the past.”

- (ERG Member)

Overall, event participation has grown year-over-year and approximately 260 new members are added to the community annually. There also has been an increase in men participating in events and engaging with the network's initiatives and content, a testament to Ellevate's increased efforts surrounding male allyship. Additionally, in fiscal year 2023, the Ellevate Team saw 25 individuals across the organization apply for the four open Leadership positions on the ERG, indicating a high level of engagement and interest across the organization.

“Ellevate has been a safe space for me to do the inner work of understanding the ways in which I participate in oppressive systems, and do the outer work to change said oppressive systems.”

- (Male Ally)

KEY TAKEAWAYS

AS AN ERG, MOVE INTENTIONALLY THROUGH THE VARIOUS STAGES OF GROWTH

Ensure activities and guidelines are formalized in the early stages of the ERG and as increased awareness, buy-in, and interest grows, focus efforts on creating broader and more systemic organizational change through policy, programs, and culture.



DO NOT REMAIN COMPLACENT

Ellevate is continuously developing its initiatives and programming and working to scale its impact. Currently, Ellevate is working to bolster its data and insights capabilities by partnering closely with ATB's People & Culture teams to understand and tell the story of women at ATB. It is gathering details surrounding multiple dimensions of diversity to better understand trends and make data-based decisions to focus efforts. It has also prioritized increasing the representation of women in leadership roles by working with internal partners, such as the People & Culture team, to mitigate bias within talent acquisition, onboarding, and promotion processes.

