# Best Practice Playbook: Program Administrators
# Benevity Affinity Groups

## Overview

Welcome!

We created this playbook for Program Administrators who are responsible for planning and executing the day-to-day program in their Affinity Groups instance. This guide is designed to help you leverage the Affinity Groups tool to support your corporate DEI goals and empower your Employee Resource Groups.

You may be a team of one or a team of many, but your role likely includes some of the following;

- Designing and executing a calendar of DEI-related activities, events, and communications
- Supporting ERG Group Leaders with recruitment and management
- Reporting on the success of company-wide and ERG-specific initiatives

Program administrators have access to the administrator space for managing product configuration, moderation, and reporting capabilities. They can also access the group leader dashboard and have access to all groups created for the community.

This guide is divided into 4 sections, so you can read the whole thing or jump right to the section you're interested in. Here are some of the topics that are covered:

# Terminology

Before we get started, we want to define some of the terminology we use regularly throughout this guide. Here are a few key terms we use:

- **Affinity Groups Platform** – The Benevity software you are using.
- **Community** – Your company's instance of Affinity Groups. We refer to your entire program as your Community.
- **Employee Resource Groups** – You may call them Affinity Groups, Employee Groups, Business Resource Groups. To simplify, we have chosen to use the term Employee Resource Group (or ERGs) to cover all these types of groups.
- **Interest Groups** – These groups are much like ERGs, but members are aligned around an activity or topic of interest. Examples include run clubs, hiking groups, book clubs.
- **Program Administrator** – This represents the primary owner of your Affinity Groups Community (likely you). There are usually only 1 or 2 Program Administrators at each company as these individuals have additional permissions and responsibilities and need to be appointed/set-up by another Program Administrator.
- **Group Leaders** – This represents the Leader(s) of each Employee Resource Group. You may have a formal structure with defined, consistent roles and responsibilities across all ERGs or the structure may vary by group. These individuals have some additional permissions and need to be appointed by a Program Administrator or by another Group Leader.
- **Employees** – As the name implies, these are all the employees of your company.
- **Members** – These are employees who have registered for your Affinity Groups Community. Note they may or may not have joined any ERGs.
- **Global Content** – Content that all Community members can see and interact with. Program Administrators can create and share content pieces like custom activities and blogs with the whole community. Group Leaders can also share content pieces with the whole community (globally), but they are limited to sharing discussions, quizzes, quick questions, polls, and events.

# Best Practices for Community Management

## Bring Them In: Recruitment

A key driver of your Affinity Group program's growth is a consistent recruitment strategy. While organic growth happens over time, you'll need to actively recruit at the start. While the Group Leaders will likely run their own campaigns on and off-platform to promote their group and its mission, you can support all groups by promoting the Affinity Groups program as a whole. By bringing people into your Community you can help them explore and join groups they may never have known about or considered. We've put together a list of simple things you can do to promote and build your Community membership:

***New Hire Onboarding***

ERGs are a powerful tool for connection especially for new employees who want to "find their people" and get involved. By showcasing the focus and accomplishments of your company's ERGs you can attract new members and help build a sense of community from day one.

Tips for Recruitment During New Hire Onboarding:

- Identify opportunities during employee onboarding to promote your Affinity Groups Community and invite new teammates to explore and join. Examples: New hire welcome package, New Joiners cohort session.
- Ask your Group Leaders if they have content or messaging to share, or an interest in presenting to new team members.

***Internal Channels***

Leverage your organization's tools (ex. Intranet page, Slack channel) to share links to your Affinity Groups tile on your SSO tool (ex. Microsoft Azure, OKTA). Be clear about the purpose of the Affinity Groups Community and the value for members. Invite Group Leaders to collaborate on company-wide messaging to streamline communications and to share some of the load. Consider offering monthly opportunities for individual ERGs to self-promote on internal channels. Ex. During Black History Month, invite your Black Employee Network group to promote educational messaging and events on a company-wide slack channel. Tools that may be available include:

- An intranet site (i.e., SharePoint)
- A messaging application (i.e., Slack)
- A company email or newsletter

Sometimes simple is best! A poster in the lunchroom can be a great tool for promoting your Affinity Groups Community.

***Social & Company Events***

Take advantage of events that are already happening or set up your own to build awareness of your Affinity Groups Community with non-member employees. Experience has shown that employees who attend a 'Women in Tech' or 'Black History Month' event, for example, are often keen to keep the conversation going by joining an ERG.

Some ideas for events include:

- ERG Discovery Day – Organize an event (in-person or online) to help employees learn about some of your company's ERGs. Invite Group Leaders to help organize or to present at the event.
- Company-wide Meetings – Leverage existing company events like Town Hall meetings, All Hands meetings, company picnics to promote your Affinity Groups Community. With everyone in attendance it's a great place to promote your ERGs.
- ERG-organized Events – Since your ERGs are likely organizing their own events, speakers, and training sessions, be sure to promote them across corporate channels. To ensure events are visible to all employees, make sure Group Leaders set up events as "Public" within your Community.

Notes on all events:

- Cross-promoting events on internal channels (see above) can help to drive sign-ups.
- When planning events around activities that align to the mission of a specific group (ex. Black History Month and the Black Employee ERG) be sure to partner with the relevant group for efficiency and for appropriate positioning.

***Demonstrate the Group's Impact***

Whenever possible, share the impact your ERG program is having both inside and outside the organization. Consider requesting time at an upcoming town hall or all-staff meeting to highlight key initiatives, remind employees of upcoming awareness dates, and share results.

Highlighting the impact of your ERG program is an excellent way to engage current members, while simultaneously generating interest amongst non-members. Sharing the impact the Community has had reminds existing and potential members of the value in participating.

***Demonstrate your Company's commitment to DEIB and your ERGs***

Whether your ERG program is long tenured and mature, or just getting started, it's important for members and potential members to know that your company is investing in DEIB today and in the future. A best practice across the industry is for each ERG to have a named Executive Sponsor. This individual can help champion the voice of the group, shout out the work they are doing or recent accomplishments during exec updates, and also be a positive signal to employees everywhere that their voices "have a seat at the table".

## Get to Know Them: Surveys and Custom Activities

One of the first opportunities you have to learn about new members is during their profile setup. Asking a few simple questions when employees join enables you to report on participation segmented by those attributes later. Your Benevity Project Manager will help you set up the profile survey during implementation.

After your community is up and running, you may discover that having additional information about members would be helpful. While it is possible to add additional questions to the Profile Survey, we recommend using this option sparingly to keep the Profile Survey length manageable. Instead, you can run a global survey at any time to capture the required information. Since activities and surveys, other than the Profile Survey, are not mandatory, you may need to promote or incent completion of the activity to ensure high levels of participation.

## Have Them Participate: Community Content

Once members have joined your community, you want them to take part. Leverage this community space to engage members in your CSR & DEI priorities. While Group Leaders are responsible for leading content and participation for their group members, Program Administrators are responsible for global messaging. Put another way, Program Administrators tell the company story of DEI and CSR, and the Group Leaders tell the ERG specific stories. Remember that if an employee joins your Affinity Groups Community but does not sign up for any ERGs, they will only see the global content and any ERG-specific content that is shared with everyone.

Group Leaders are limited to creating polls, quick questions, quizzes, events as well as posts. As a Program Administrator, you can create those same content pieces but also a variety of custom activities and blogs. The Custom Activity Builder lets Program Administrators create surveys with sliders, multiple choice, ranking, photo picker and storytelling questions. You can share these activities with everyone in the company or with select ERGs or leaders.

The Group Leaders should post content frequently to engage their members on group-specific topics. Sometimes there may be an overlap between global and group-specific content. For example, you and the Pride Network want to celebrate Pride week with a blog or activity. As a Program Administrator you can work with ERGs on key events and boost exposure by publishing a blog and creating custom activities which are things Group Leaders cannot do on their own.

***Calendars***

To manage the variety of global and group content, there are 2 calendars to help keep things organized:

- The ***Program Calendar*** is available only to Program Administrators and is designed to help you plan and track progress against global, program objectives. We find that building out quarterly programs works best for us, but programs can be any length. Start by adding your high-level objectives and then blocking out key dates for any events or awareness days. After establishing your quarterly projects and information needs, add in placeholders under each objective to map out the timing for activities, blogs, quick questions, quizzes, polls, and custom activities. Once a date is confirmed, convert it from a concept to whatever kind of activity it is.
- The ***Group Leader Calendar*** is available to all Group Leaders and Program Administrators and is designed to facilitate scheduling and collaboration and minimize overlap of key events. It is easy-to-use and provides an at-a-glance view of everything the ERGs have planned as well as all global content. We recommend that Program Administrators review the calendar frequently to find opportunities to support and showcase the work of ERGs.

***Variety of Content***

Experience shows that members like to participate in different ways. By including multiple options for getting involved, members can choose content that is creative, storytelling or more qualitative focused. Most content should be serious and related to your ERG program goals, but there is always room for fun, lighthearted, seasonal content.

Try dividing larger topics into bite-sized quick questions, quizzes, or polls. For example, to explore the implications of a new piece of legislation, you could start with an informational blog, followed by a poll or quiz. This approach provides multiple ways for members to participate and reduces your effort in building out content.

***Frequency of Content***

One of the questions we are frequently asked is “how do I know if there are enough things for Affinity Group members to do?” The goal is to have enough things to bring members back regularly but not so many that it is too much work to manage. In the early days, ensure you frequently publish polls, quick questions, quizzes, and blogs you find interesting. Ideally you would have at least 1 or 2 content items scheduled per week and adjust based on participation. If your Group Leaders publish a lot of global content, you may be able to publish less frequently.

Over time, the goal is to have members drive the majority of content and conversations, requiring less effort from the Group Leaders and the Program Administrator. As the Groups mature, members will start their own discussions, answer each other's questions, and share content and topics that you didn't even know were on their radar.

***Sources of Content***

Group Leaders are encouraged to look for articles and blogs from sources they follow. For Program Administrators, we suggest sharing company news and insights about your ERG and CSR/DEI programs. Some examples of sources to monitor include:

- Annual Reports
- Key presentations
- Executive Sponsor Reports on ERGs

Industry publications on ERGs & DEI, Ted Talks and LinkedIn are good sources for more general content to share. Pay attention to topics that get you really excited or that make you think. If a piece of content resonates with you it should likely pique your members' interest too.

***Trends in Frequency & Variety***

As you build your Program Calendar, take note of member participation habits from the previous month. You can find this information on the Main Community Dashboard. What types of content do they like? Mostly polls or quick questions? Open discussions? How often are they logging in? If you notice a topic with a lot of engagement, use that as inspiration to develop a new poll, quick question, or quiz.

***A Note on Participation***

Participation can come in many forms. Some members will complete every activity, poll, quick question, or quiz you post and participate in every discussion, while others may not "do" anything, but that doesn't mean that they aren't finding value in what you are providing. Community lurkers often get a bad rap, but they may find great value in reading the content and comments.

## Get Them to Stay: Member Experience

A key to keeping members engaged is to provide an experience that makes them feel valued, important, and heard. Engaged members keep coming back and contribute to your overall community goals. Best practices for creating positive member experiences include:

***Ensure Value***

To build and grow a successful community, employees need to clearly understand the benefits of membership. What value will they get out of joining your Affinity Groups community? What value will they get from joining a Group? Exclusive access to leaders, programs, or professional development opportunities? Front row seats for trying new programs and providing feedback prior to launch? A chance to connect with individuals with similar interests? Be clear about why someone would want to be a part of this space and be sure to deliver on it!

***Close the Loop***

Many companies and ERGs solicit the perspectives and experiences of their members to shape programs and influence decisions. Consolidating findings and insights from surveys and sharing with your members helps everyone understand the value of their efforts and demonstrates collective impact. We recommend creating share-back posts whenever possible to tell the group how their input was used.

***Surprise & Delight***

Some ideas for increasing participation and engagement include:

- **Prizes:** Consider awarding weekly, monthly, or even occasional gifts to employees for impactful posts. Prizing may be especially helpful at launch. Offering prizes of donation currency can be effective if your Affinity Groups Community is connected to Spark.
- **ERG Member Gifts**: Consider providing t-shirts or swag for Group Leaders or for long tenured or highly active members. Some clients have included ERGs in the design process, where members can submit their suggested designs for voting within the Community.
- **Executive/Guest Meet & Greets:** Surprise employees with an opportunity to interact in the community with an influencer or company executive. Virtual "Ask the Expert" or "Meet & Greet" events can bring in new members and bring existing members back. Share links to these virtual events on your company Slack or Teams channel to encourage non-members to join.

# Ongoing Community Tasks

As a Program Administrator, there are a few simple recurring tasks that will position your Community for optimal engagement, insights, and growth. We've noted some of the best habits to get into on a weekly, monthly, quarterly, and annual basis.

## Weekly/Ongoing Tasks

***Support Email Address***

Watch for member and Group Leader communication in your community support email inbox. Requests may include support with accessing an account, completing an activity, or questions about the community. Answers to common member and Group Leader questions can be found in your community's Help guide.

***Review & Respond to New Submissions***

Each time you log in, check for new submissions to global activities and respond with a comment or a like. Encourage other leaders or tenured members to jump into any discussions where they have experience or can add value.

***Publishing, Editing, Scheduling, and Inactivating Content***

Be sure to review your Program Calendar and schedule, publish or inactivate any custom activities, quizzes, quick questions, or polls for the week. Prior to publishing, review the questions and confirm who you want to be able to see it. To learn how to build a new activity, quick question, quiz, or poll check out the Help guide in your community. There may be conversation topics that align to a key calendar date. Make note of dates of interest for your company, your ERGs, or a seasonal trend. Be sure to post blogs or custom activities on those dates or collaborate with the appropriate ERG to coordinate.

***Community Newsletter***

Sending a community recap newsletter is a great way to connect and remind employees to log in and see what's new. Delivering a community newsletter at a regular cadence helps promote key activities, share key resources, and encourage logins. The newsletter is a great way to promote upcoming events, important blogs or activities that are open to the whole community. Talk to your Group Leaders about ways they can contribute to the newsletter to promote and share upcoming activities and events.

Some tips and tricks to writing a great community newsletter include:

- **Content***:* Keep it short and sweet - treat the newsletter as a "teaser" to encourage employees to click through to the community to learn more! As a best practice, we recommend promoting a maximum of three different community elements within your email. And of course, make sure you have a clear call-to-action. Some ideas for what to promote include:
    - Activities or things to do (participate in a discussion, complete a survey etc.)
    - Popular content shared by members. Note: be sure to ask for permission before sharing content globally.
    - A teaser for an event that's coming up. Work with the ERG Leaders to find out about planned events.
    - A reminder for an awareness day that's coming up. Work with the ERG Leaders to find out which days they will recognize and how they plan to support.
    - Reminders for upcoming deadlines (ex. Applications, etc.)
    - Popular (or less popular) blog posts to increase views

- Member shout-outs for enthusiastic participation

- **Design & Execution:**
  - **Copy:** Write your copy off-platform in a Word or Google document to make sure all spelling and grammar is checked.
  - **Hyperlinks:** When a specific post or activity is mentioned, make sure to include a link. Hyperlinks can be placed as:
    - Buttons
    - Images
    - Text within paragraphs
  - **Imagery**: Use visuals whenever possible
    - Make sure to upload images to our server
    - Use gifs & emojis as appropriate
  - **Testing**: If you are promoting a community element that has not yet gone live, be sure your email deploys after that element is scheduled to post, or members won't be able to access it!
  - **Frequency**: As a best practice, stick to a regular schedule for your community emails, such as every Wednesday morning. In the early days of your Affinity Group program, play around with different days and times to assess the open and click-through rates. Once you land on a schedule, stick with it. For some companies, a newsletter each week is appropriate, where for others it's once a month - do what's best for you and your coworkers!

***Upcoming Content Preparation: Promotion & Visibility***

As you look ahead to the activities going live in the coming days, think about how you can promote them to increase visibility and encourage participation. For example:

You can post a blog about an upcoming event or awareness day you'd like people to be aware of in an upcoming activity and provide a hyperlink to a custom activity and vice versa. For more information on writing blogs, visit the Help guide of your community.

A community banner is a great way to draw attention and create an immediate call-to-action. We recommend updating your community banner on a regular basis (every few weeks), so the community looks fresh each time members log in. You may want to change them more or less frequently based on member login frequency and the duration of key activities or awareness days or weeks. For more information on building banners, visit the Help guide of your community.

## Monthly Tasks

***Review Trending and Organic Content***

Have a look at what members are discussing and make notes for future inspiration. Key areas to review include discussion topics, comment threads on activities and blogs, and any dialogue in which a member asks a question, and a fellow member has responded.

***Review Dashboards***

Check out the Main Community Dashboard to learn about member participation habits from the previous month. What types of content do they like? Mostly polls or quick questions? Open discussions? How often are they logging in? Are you meeting your established benchmarks?

***Shareback Blogs***
Consider writing a shareback blog to summarize the results of a key activity.

***Member Features or "Ask the Experts"***
Consider highlighting a community member in a blog as a regular feature. We've seen success from sending members a list of questions about themselves and requesting some personal photos. Similarly, you can do the same to highlight an expert within your company, providing insight into their role or background.

## Quarterly Tasks

***Review Community Content***
At the end of each Program Calendar (typically 90 days), it's a good idea to review featured items and posts where you modified the feed score. For more information on modifying a feed score visit the Help guide in your community. Clean up and remove anything no longer current and add anything new.

***Community Health & Trends Assessment***
We recommend doing an assessment of your community's health trends every quarter by utilizing the Dashboard and Reports available to Program Administrators.

From the Program Administrator view, take a look at:
Dashboard: Set the time frame for your review and note key member statistics and whether things are trending up or down from your last check-in.

- Total membership count
- New members within last quarter
- Number of submissions
- Average logins per member
- Member engagement (% actives vs, % lurkers)
- Profile Responses: Results from this report can provide insights on demographics, motivations for joining the community, and more.
- Program Snapshot: This report is a great way to see member engagement with content assigned to the program objectives you set.

What is the data telling you? Are you meeting your program objectives and the needs your Group Leaders and members have outlined? Take time to reflect and use your findings to help guide the next round of content and themes. A final tip: keep a record of these quarterly metrics so you have pre-recorded milestones and data points when you do your annual review!

For more information on your community visit the Help guide in your community.

***Upcoming Program Calendar Build***

After assessing community health metrics (see above) and referencing your monthly notes of organic and trending member content, it's time to start planning out your next Program Calendar.

We generally recommend the planning of your next Program Calendar about a month in advance. For example, if your next Program Calendar is set to begin at the beginning of September, get your concepts and ideas in place by the beginning of August. You can then draft and build activities over the weeks to come. Keep in mind our recommended cadence of one to two new items each week, and reserve space for ERG-specific content and awareness dates.

For more information on how to build a Program Calendar, check out your community's Help guide.

## Annual Tasks

***Member Satisfaction Survey***

We recommend running a member satisfaction survey at regular intervals to monitor how employees feel about the community. Depending on the goals Affinity Groups is being introduced, you could ask for feedback on topics such as change management, value of content being shared, progress being made within the ERG or larger DEIB programs, and of course, ask for any suggestions on what your members might like to see.

# Best Practices for Engaging a Quiet Community

When you launch your Community, you may find that members have a lot to talk about and are keen to engage and participate. But what if you have a quiet crowd? How can you get them talking?

An easy first step to fostering a thriving community is to validate and acknowledge member comments. By encouraging and recognizing participation, you can make sure no one is talking into a void. A rapid response/comment from anyone will support the return of new members. Dig deeper to get a second contribution from new members.

Acknowledge comments with statements and probing questions:

- “Why do you think that?”
- “Have you also found…?”
- ” Can you tell us a bit about your experience?”
- “How did you solve that problem?”
- “Do you have any examples that you can share with us?”
- “I hadn’t considered that perspective before – thanks for your thoughts.”

Other actions to further conversation/participation:

- Reveal a personal experience or anecdote (if appropriate).
- Recognize the impact a member has made to the community.
- Create opportunities for members to build relationships within the community. Introduce members to one another; suggest members join ERGs based on their comments and interests.
- Mention/highlight relevant events or ERGs based on conversation.
- Ask questions that will prompt other community members to comment.
- When appropriate, designate others within your organization to answer member questions.
- Like and comment, especially for posts by new or less active members.

# Useful Tools

***Reviewing New Content***

Review new content in the Member Content section of your Program. This view shows you everything new. Moderate current activities, jump in with comments and ask probing questions to further conversations, and welcome new members.

***Reported Content***

Check for member-reported inappropriate content on the administrator dashboard. Edit questionable submissions and alert the member by sending a private message. Refer to your community guidelines whenever you are required to edit member content. For more information on how to review reported content, visit the Help guide in your community.

***Featured Content***

Featuring submissions is an excellent way to engage and recognize the experts within your community. When you see a particularly thought-provoking post, feature it, so it’s one of the first things members see when they sign into the community. Keep your featured content fresh, so that when members sign in, there is always current and relevant content. For more information on featured content, visit the Help guide of your community.