



Starting an Employee Resource Group



Introduction: What Is an ERG?

Employee resource groups (ERGs) are a way for employees at a company to network, build community, develop leaders and create change within an organization. Some of the first ERGs were started in the 1960s due to increased discussion of race in the workplace as a result of the civil rights movement.¹ Because skin colour often precluded these employees from being invited to networking events, these groups were a way for Black, Indigenous and people of colour to connect within their companies.

Over time, ERGs started to focus on other areas of identity, including gender, disability, veterans, indigeneity and LGBT+ communities. The first ERGs in Canada for lesbian and gay communities started in the 1990s.² Some of these first groups organized around the need for lesbian and gay employees to connect with one another and to argue for spousal benefits to be accessible to same-sex couples.

Lesbian and gay ERGs eventually expanded to explicitly include bisexual, trans, queer and Two-Spirit workers. They also went from what some organizations saw as a challenge to a benefit as there became more recognition that diverse and inclusive teams perform better.³ In Canada, it has been found organizations that are inclusive of LGBT+ employees do 22% better in the marketplace than their competitors.⁴

While this guide uses the term ERG, it is important to keep in mind that some companies use different terms to describe the same concept. Other widely used terms include affinity group, business resource group, community of practice and inclusion council.

Affinity groups: Affinity groups will often focus more on the networking of members of the same community. Affinity groups will occasionally start with more of a social component first and organizational change second.

Business resource groups: Business resource groups are still organized around a specific group like LGBT+ people, but they generally prioritize the positive impact these groups can have on overall business goals.

Communities of practice: Communities of practice can focus on any form of shared issue or concern. Unlike the others, not all communities of practice are focused on inclusivity, but many organizations have communities of practice focused around LGBT+ inclusion.

Inclusion councils: Inclusion councils start from the perspective that they are trying to address multiple forms of inclusion within the organization. These groups, unlike the others, rarely focus on just one community and often will include members of the organization's senior leadership team. They are most appropriate for smaller organizations that do not have a large enough workforce to justify several independent groups focused on individual aspects of diversity.

Many organizations decide to name their ERGs with the above names, but most will still just name their groups ERGs. Once you know the format of the group you want, you can start your journey in creating it.

What's in a Name?

Many new ERGs struggle to agree on a name for their group. Based on their varied experiences, group members might even butt heads over details like which acronym to use. Here are some tips to help your ERG brand itself:

- Approach your employer's marketing department for support. Ask if they have any suggestions to help your ERG's name align with the company's brand guidelines. They might even be able to help you with other brand elements like designing a logo.
- Look at other ERG names, and have an open conversation with group members about what they like and don't like about them. Sharing how language impacts each other can foster deeper understanding of the diversity present in LGBT+ communities.
- Float your potential names past queer and trans community groups. They might have feedback on how to make your name more inclusive of the entire community.
- Regardless of what name you choose, make sure every group member knows why the ERG exists by developing common language in the form of a mission statement. It can be confusing for potential ERG members if when asked why the group was formed every member gives a different answer.



LGBT+ Significant Events

Starting an ERG can feel both daunting and exciting. Keep in mind that if other ERGs already exist within your organization, there may already be processes in place for you to follow. It can be tempting to start out by engaging a lot of people. Keep in mind that it is often better to pick a few key people who share your goals and enthusiasm. If you are having trouble finding those people, consider promoting that you are looking to put together an ERG (and the expected time commitment). You can promote:

- Through your company's intranet site
- At your company's Pride celebration
- By attending events put on by Pride at Work Canada, Canada's LGBT+ Chamber of Commerce (CGLCC) and other similar LGBT+ professional networking events
- By talking to your human resources or inclusion and diversity department representatives

Once you have your core ERG members, it is important to define everyone's roles and responsibilities by creating job descriptions. Some of the roles to consider include:

(Co)Chair: The chair or co-chair is responsible for providing direction for the ERG and is responsible for facilitating meetings of the group. The chair will be responsible for being the main point of contact from the ERG with internal and external contacts. The chair position can be a big role, which is why many ERGs decide to have two co-chair roles to split up the work. Remember the primary role of a chair or co-chair is to build consensus, not to make unilateral decisions on behalf of the ERG.

Secretary: The secretary is responsible for keeping the agenda and minutes of the group's meetings and documenting action items related to group projects. Some ERGs will put a term as secretary as a prerequisite before becoming chair so that the new chair has a strong knowledge of how the group functions.

Treasurer: The treasurer is responsible for keeping track of the finances. This includes making sure the group is staying within budget. They work with the chair to create the budget. In some smaller ERGs, the secretary and treasurer roles are combined as a secretary-treasurer.

Member at large: Creating a job description for a member at large can also be helpful as it lays out the expectations of all other members. For some groups, that may be as simple as attending a certain number of meetings a year, or it could include more concrete responsibilities like having helped organize at least one event a year.

X project lead: Depending on your group you may also want to create job descriptions for subcommittee or project leads. Some examples could include a policy subcommittee lead, an events subcommittee lead or leads focusing on certain areas of the community, including trans inclusion lead or women's inclusion lead.

Executive sponsor: Of core importance is also an executive sponsor. Executive sponsors act as advocates for the ERG and role models to senior leaders. We will discuss executive sponsors more in the next section.

Some ERG members may feel that the group's membership should be limited to employees who identify as LGBT+. It is important to remember that limiting the involvement of employees because of their identity could be construed as discrimination and may present a legal liability for the employer. It is also important to keep in mind that some employees may want to get involved in the ERG because they have an LGBT+ spouse, child or other family member. They also may wish to get involved as an ally to LGBT+ communities or may in fact be LGBT+ but have not taken steps to come out in the workplace. ERGs are meant to be welcoming and inclusive spaces that bring people together, not keep them apart.



Volunteer Engagement

While everyone might be excited about the ERG, not everyone has the same capacity to get involved. Remember that group members are essentially employee volunteers. Here are some tips to help your ERG engage members effectively:

- Establish clear expectations about the expected time commitment in the roles and responsibilities of each ERG member. This helps employees make an informed decision about whether they have the time to get involved.
- Encourage transparency among group members about their capacity, and maintain good communication. Make sure volunteers know who to notify if they are unable to fulfil their duties because of a looming work deadline or personal obligations.
- Clearly define what's in it for them to keep everyone motivated. It's not selfish to get something out of volunteering. Whether it's facetime with senior leaders, learning new skills or a deeper understanding of their colleagues, every member of the ERG should be able to define what benefit they get from volunteering.
- Develop a succession plan to encourage your ERG's longevity. Everything shouldn't fall apart if one ERG member goes on leave or takes a job with another company. Make sure those in leadership positions take the time to develop the skills of junior ERG members who can one day take the reins.

ERG Leader and Burnout

It's common for ERG chairs, co-chairs and executive committee members to feel as though the world is on their shoulders. Balancing the work of an ERG with a full-time job and family responsibilities is no easy task. Add in the fact that the emotional labour associated with ERGs can be very taxing, and it's easy to see why ERG leaders consistently report feeling burnt out. Here are some tips on ensuring your ERG leadership can handle what's on their plates:

- ERG leaders need to be transparent about their workload with both ERG members and their direct supervisor. It is typically better for everyone to know that someone will be unavailable ahead of time than to miss deadlines and cause disappointment.
- ERG leaders should develop an understanding of the capabilities of ERG members so they know who to tap when they need to delegate something to the broader group.
- All leadership positions should have built-in term limits. This creates a natural checkpoint for leaders to opt out of their responsibilities should their availability change and provides regular opportunities to develop leadership skills in ERG members who have not yet had the chance to lead the group.

Executive Sponsorship

What Is an Executive Sponsor?

An executive sponsor should be a champion for the ERG's membership at the highest levels of the company. Their position at the top can help the ERG navigate nebulous company processes, identify where the group's work can help support business processes the ERG might not be aware of and obtain resources with which the ERG can have the greatest impact for employees.

Executive Sponsor Responsibilities

A study conducted by Jennifer Brown Consulting found there are five main roles that effective executive sponsors hold:⁵

Strategist: They help to do big picture thinking for the ERG. They act proactively looking at goals and how the group can effectively reach those goals by matching them to organizational goals.

Evangelist: They act as an advocate with upper and middle management on behalf of the ERG. The evangelist promotes recruitment to the group and will intervene with senior leadership on specific issues of importance for the ERG.

Innovator: They are the creative risk-taker. They are the one who will bring new resources or ideas to the table to encourage the ERG to be as effective as possible. They leverage their position to address challenges that ERG members may have in accessing resources.

Broker: The broker sees themselves as the connector within the organization. They will make introductions between key people, connect company priorities and share them with ERG members. They will also try to connect the ERG to funding and new members.

Mentor: The mentor acts as a role model for others within the ERG. They will openly provide professional advice and help to develop emerging leaders. Instead of focusing on the organization, they focus on building ERG members up so that they can advocate for themselves.

These five roles are broad descriptions, and any individual likely has strengths in multiple categories. Creating a job description and discussing with your potential executive sponsor their strengths and weaknesses can help guide the primary roles your executive sponsor will play for the ERG. When you also play on an executive sponsor's strengths and passions, you will receive the best work from them, and it will help showcase how to best engage them.

Engaging Your Executive Sponsor

Your executive sponsor should know what they are getting into right from the start, just like any other volunteer. If you're approaching a senior leader about becoming an executive sponsor, make sure they know why they are being asked and what is expected of them. Clearly outlining their roles and responsibilities at the very beginning of the relationship will keep you from being saddled with an executive sponsor who does not meet the ERG's expectations.

Make sure you have an open and honest dialog with any new executive sponsor to determine their understanding of LGBT+ issues. If someone doesn't understand the most appropriate language to use, how can they be an effective spokesperson for the group? Clearly identify opportunities for the executive sponsor to consistently learn and grow their knowledge.



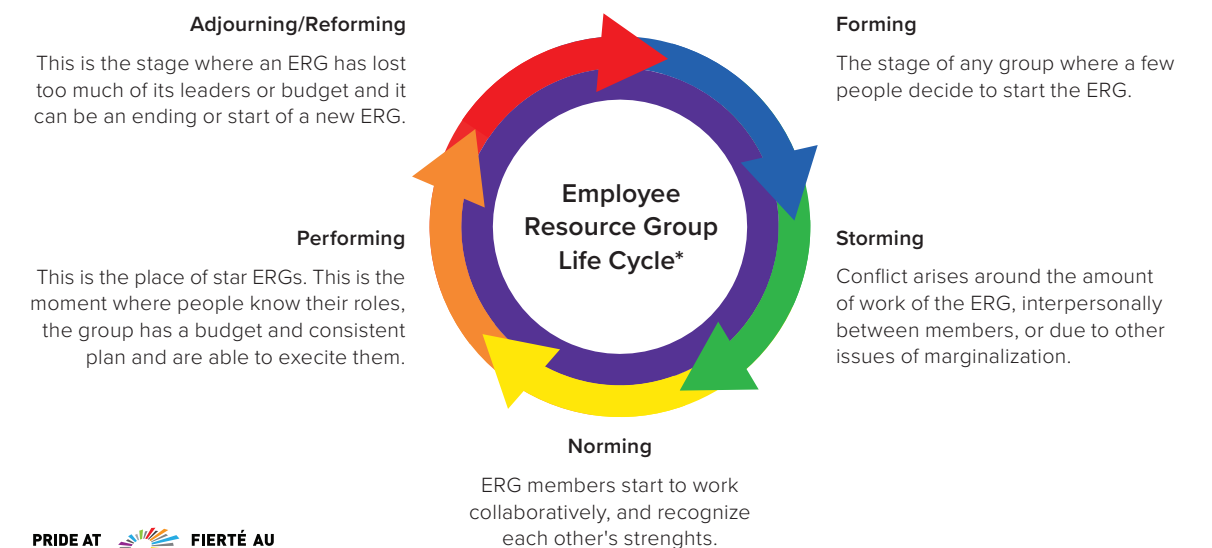
Should Your Executive Sponsor Be LGBT+?

Some ERG members may feel they need an executive sponsor who identifies as a member of the LGBT+ community. Others may think it's better to have a cisgender straight ally. Here are a few things to remember when deciding on an executive sponsor:

- What matters most is that your executive sponsor is available to listen and willing to help reach the goals set by the ERG's membership.
- Just because someone is LGBT+ doesn't mean they want to be an advocate for the community, and that's OK. They might not feel they have the knowledge, or they could be more focused on another part of their identity, such as race or ethnicity.
- Not all companies have executives who are LGBT+ or who are LGBT+ and out to everyone they work with.
- Someone doesn't have to be LGBT+ to understand the challenges faced by community members. Lots of cisgender straight people have LGBT+ friends, partners, spouses, extended family or children. Even if they don't have any personal connection to LGBT+ communities, they could be more informed than some people who do!

The ERG Life Cycle

Like any organized body, ERGs go through their own life cycles. One model to view this is Tuckman's linear model of group development. Though originally proposed in 1965, it still is applicable today. Tuckman referred to five stages: forming, storming, norming, performing and adjourning.⁶



Forming: This is the start of any ERG. During this stage, a few key people start to put together the group and discuss ideas. Members should focus on getting to know each other and establishing goals, rules and roles.

Storming: This is when the realities of forming a group start to come to light and conflict may erupt. During this phase, an effective chair will address interpersonal conflicts, reinforce what was defined in the previous stage and fill gaps in the group's knowledge of broader issues of diversity that may impede progress.

Norming: As group members become more settled within their roles and conflicts settle down true cohesion starts to take place. The most important part of this stage is recognizing members' strengths, honouring them and reflecting on the group's various successes.

Performing: A performing group is one that has a consistent annual plan that produces growth within the organization, has steady access to a budget and has planned turnover that is slow but allows some leaders to step back while mentoring new leaders to step up.

Adjourning/Reforming: The most common reason for a group's work to stop is the departure of the chair due to burnout or a new employment opportunity. Other reasons may include a lack of organizational support and budget constraints.

No matter where you are currently in the journey of your ERG, it is important you use the stage you are in to help impact your ERG business plan.

Conflict Resolution

Even the most inclusive groups experience conflict. ERGs are no exception. Here are a few tips to make sure you're ready when disagreements inevitably arise:

- Clearly and transparently outline how and by whom ERG decisions will be made. Engage the entire ERG to determine when individual members can make choices for the ERG and when things need to be brought to group members for discussion or a vote.
- Define a process by which you will accept complaints or resolve conflict, whether it's between ERG members or between general employees and the ERG. This means identifying to whom complaints should be sent and which business areas, such as HR, may need to be looped in to ensure effective resolution.
- Regularly present opportunities for open dialog and feedback, both from ERG members and general employees. If ERG members feel they aren't being listened to, they may lose faith in the group's mission and damage its reputation.
- Choose to view complaints as opportunities for colleagues to learn. For example, if someone doesn't feel comfortable with a rainbow flag at the welcome desk and is vocal about it, make sure they understand why the ERG thinks it's important and how it fits within the company's values.



Creating an ERG Business Plan

Effective ERGs lead with goals and objectives. Often when we are starting a new ERG, it can be tempting to make it all about Pride. Pride is a time of excitement and celebration, but rarely does leading with creating an event for an event's sake produce measurable results in the organization overall. Starting with a plan that connects to business objectives will make a difference in the final ERG return on investment.

Defining Goals

Where do you envision your organization being, and what are your main focuses? Use business objectives as well as where you would like to see the company be in the future as guideposts for your goals. Here are some examples of goals and then activities that can be connected to them:

Goal	Activities
Goal 1: Create opportunities for LGBT+ employees to connect to one another.	<ul style="list-style-type: none"> • Create an intranet site for the ERG and a mailing list for ERG members. • Host a Netflix watch party of an LGBT+ movie. • Create a mentorship program for LGBT+ employees.
Goal 2: Build a gender-inclusive workplace for all trans, non-binary and gender diverse people.	<ul style="list-style-type: none"> • Review policies and procedures that impact trans and gender diverse employees. • Create a trans-inclusion policy with the support of HR. • Convert some washrooms to be all-gender washrooms, and update signage and resources in gendered washrooms.
Goal 3: Engage with the LGBT+ community externally and showcase [your company] as a leader in inclusion.	<ul style="list-style-type: none"> • Pick an LGBT+ charity to fundraise for, and create an internal fundraising campaign. • Train the communications department on LGBT+ inclusive communications. • Have a float in the Pride parade in [city/cities].
Goal 4: Create customer service processes that support a better guest experience.	<ul style="list-style-type: none"> • Develop standard greetings for front desk staff that are inclusive of all genders. • Roll out training about how to deliver customer service without making assumptions about family relationships. • Produce on-site campaigns that include images of families that reflect the diversity of the LGBT+
Goal 5: Attract more LGBT+ people and families to the business.	<ul style="list-style-type: none"> • Organize special events or days that specifically welcome LGBT+ people and families. • Advertise the business's efforts to include LGBT+ employees. • Book performers and/or speakers who are LGBT+ in event spaces.

The Business, Legal or Moral Case for Inclusion: Which One Should My ERG Use?

One of the most common goals among ERGs is generating buy-in for LGBT+ inclusion across all business areas. It's important to understand the three primary cases for inclusion:

1. Moral case: LGBT+ people are human beings who deserve to work in environments that afford them dignity and respect.
2. Business case: Diverse teams deliver better results and can appeal to more segments of any given market.
3. Legal case: Employment discrimination against LGBT+ is illegal and poses a significant liability for any company.

While one would hope the moral case was enough for everyone to buy into LGBT+ inclusion, this is not always how it is. ERGs therefore need to understand how to engage stakeholders in all three cases. Here are some tips on how to make the greatest impact no matter which case you're focusing on:

- Be prepared to produce metrics specific to your company when building a business case. For example, source information about who your company's clients and customers are to identify how the business is missing out on revenue opportunities and how the ERG can help.
- Appeal to their competitive side by identifying how the industry in which you work contributes to LGBT+ marginalization and how the ERG can become a catalyst for change. Don't be afraid to show what your competitors are doing in the space.
- Identify compelling personal narratives that illustrate the challenges the ERG is trying to confront, keeping in mind the boundaries set by individual ERG members about telling their stories.
- Develop case studies based on legal cases within your industry to show the benefits of proactively limiting the company's legal liability.



Creating Events

The first step to a successful event is deciding on specific goals and desired outcomes. Will the event be in celebration of the progress the LGBT+ community has made? Or will it build connections between employees? Is the focus education? If so, whose knowledge are you trying to develop? Finally, will this event be for internal staff, clients or customers? Can the general public attend? All of these questions are important to ask and discuss with the entire ERG before time and resources are spent on planning.

Celebratory events: The road to inclusion for LGBT+ people is one that has been hard fought for by activists, community organizers and individuals who have made impacts on their networks. Some examples of celebratory events include:

- Pride season fundraisers for LGBT+ charities
- Performances by LGBT+ artists and drag performers
- Lecture-style events with inspirational guest speakers

Connective events: Networking engagements help LGBT+ professionals to expand their networks. Some examples could include:

- Mixers for LGBT+ professionals
- Coffee chats where professionals are matched to talk one-on-one
- Watch parties where ERG members can view LGBT+ movies

Educational events: Defining specific and measurable learning outcomes for these events is key. Some effective forms of training include:

- Internal sessions with a direct connection to employees' daily responsibilities
- E-learning that includes multiple sessions and evaluations of progress
- Allyship programs that require a minimum commitment to achieve certification

Many organizations incorrectly assume that in-person events at which LGBT+ people tell their coming out story will make measurable change within the workplace. There is no evidence to suggest this is true. While satisfying the curiosity of cisgender straight people, these events frequently retraumatize LGBT+ people who feel they have a responsibility to tell intimate stories they might not otherwise share in the workplace, especially when they are asked by a senior leader to do so. While personal narratives can be a helpful educational tool, they must be used sparingly and with great care. The most effective events are ones with a direct link to changing workplace behaviours, not simply hearts and minds.

For more information about event planning and execution please, see the CGLCC's Guide to Hosting LGBT+-Inclusive Events.

To Drink or Not to Drink? That Is the Question!

In some industries, it's standard practice to serve alcohol at events. However, there are a few things ERGs should consider before serving alcohol at an event or meeting. Here are some questions ERGs can ask themselves to help the decision-making process:

- **Is alcohol required to meet the event's goals?** Determine whether or not serving beer, wine and spirits will add something to the event or if it's being served because it's the company's standard practice.
- **Will serving alcohol be a barrier to attendance?** Some ERG members may not drink for religious reasons or because of experiences with alcoholism and substance use or abuse, which are more common among LGBT+ communities. Determine whether having a bar might limit attendance.
- **Are we being as safe as possible?** It's important ERGs take responsibility for event attendees not being overserved and not driving after consuming alcohol. Think about whether the ERG has a budget to cover taxis for people who are not able to operate a vehicle.



Changing Policies and Procedures

A key role of many ERGs is influencing organizational policies and procedures. Consider having a policy lead in the group to help steward the focus. The ERG can become a resource for the HR team. See if there are any “quick wins” that you might be able to easily push forward. For example, if your ERG members are part of a communications team, think about how you could get pronouns integrated into email signatures, name badges and business cards. Utilizing the connections that your team already has will expedite change.

To learn more about making LGBT+ inclusive policies and procedures, review the CGLCC’s Diversity & Inclusion Policies & Practices Internal and External Resource Guide.

LGBT+ Employee Support Programs

Consider providing space for the professional development of ERG members, showcasing how employees can access inclusive benefits, and formalized mentorship programs.

Professional development: ERG leaders should be provided with opportunities to grow their skills. This could include having a budget for members to do complete leadership training or attend conferences.

Inclusive benefit programs: Employees often don’t know how to access inclusive benefits even if the company does have them. Consider creating a document on how LGBT+ employees can access benefits that may be relevant to their needs.

Mentorship programs: These programs match employees at various levels of seniority. This relationship is beneficial for both the mentee and mentor, as they learn from each other.

Supporting the community: Consider fundraising for LGBT+ charities, or exert influence on charities the company supports to be more LGBT+ inclusive in their practices.

ERG Health and Well-Being

Everyone has a different experience of being LGBT+ or an ally. While for some people LGBT+ inclusion is an abstract concept, for many ERG members the topics being discussed can bring up a lot of emotions. Here are some tips to help ensure your ERG is a safe space for all employees:

- Past experiences with trauma can impact ERG members’ willingness to share their personal stories. Also, it can be exhausting to feel like you need to represent a segment of the LGBT+ community when you are the only member of the ERG with specific lived experience. Leave space for people who want to be involved but aren’t comfortable talking about themselves.
- Some people may be out at work but not in other parts of their life. Some ERG members might not be out to other groups, such as their families, neighbours or faith communities. Make sure these members feel as respected and included as those who are out in every aspect of their lives.

- Just because someone is LGBT+ doesn’t mean they will want to get involved with the ERG, and that’s OK. They might be involved in other initiatives that are more important to their personal or professional development. It might just not be their cup of tea. Don’t expect someone to be involved just because the group exists.
- A lot of employees are drawn to the ERG because they seek peer support. Explore opportunities for ERG members to obtain new skills that will help them in this regard such as learning active listening techniques or attending Mental Health First Aid training.
- Make sure there is a common understanding of which conversations stay confidential and the legal ramifications of outing people in the workplace.

ERG Communications

Since ERGs are connectors, it’s important to develop a communications strategy that includes how the group will connect with each other as well as how they will communicate its initiatives to the general employee population.

The first step to an effective communications strategy is to define all of the communication channels that are available to the ERG. Examples of channels include employee intranet platforms like SharePoint or Yammer, company email lists or break room bulletin boards. Once you’ve listed all of the channels at your disposal, decide which types of messaging are appropriate for each and whether the intended audience is internal to the ERG or external. This will dictate the type of messaging you develop for each channel. For example:

Employee Intranet	Email Distribution List	Bulletin Boards
<p>Uses:</p> <ul style="list-style-type: none"> • (Internal) Dedicated group for ERG members to have private and confidential conversations about ERG business • (Internal) Open group for general employees to learn about ERG activities and how to get involved 	<p>Uses:</p> <ul style="list-style-type: none"> • (External) General notifications about upcoming events and learning opportunities • (External) Announcements about ERG milestones and observances, like the International Trans Day of Visibility 	<p>Uses:</p> <ul style="list-style-type: none"> • (External) Communicating ERG activities to frontline workers who do not have an email address with the company • (External) Inspirational messages from the executive sponsor

To avoid mishaps and confusion, take care to apprise your employer’s communications department of your strategy to keep people informed about ERG activities. They can help direct you to any brand guidelines that should be followed and even lend a hand with crafting messages in ways that have been proven to be effective within the company in the past.

Always take appropriate action to safeguard the privacy of your ERG’s members and any employees who attend events. Some employees may be out to members of the ERG but not everyone in the work environment or to their families.

Conclusion

While comprehensive, this guide may not address every challenge your ERG may face. Keep in mind that if you're stuck on something, chances are another ERG has been there before! As your group forges its own path, remember to rely on the lived experience of ERG leaders at other organizations. Sometimes just knowing you're not alone in your struggle is just what you need to innovate, persevere and succeed as an ERG.



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