A Guide to Colleague Resource Groups
Table of Contents

Welcome Letter 3
CVS Health Purpose and Strategic Diversity Management Mission 4

Introduction 5
What is a Colleague Resource Group? 5
Colleague Resource Groups at CVS Health 5
Why Have Colleague Resource Groups? 5

Starting a Colleague Resource Group 6
Steps to Forming a Colleague Resource Group 6

Criteria and Requirements for Colleague Resource Groups 7
CRG Structure 7
Membership Requirements 7
Colleague Resource Group Role Definitions 7
CRG Mission 9
CRG Business Plan 9
CRG Budget and Forecasting Requirements 9
Ongoing Requirements 10

Funding 12
Funding 12
Collaborative Events 14

Communication 14
Communication Vehicles 14
Sign Posting 16
Recommended Communications Timelines 17
Non-solicitation Policy 17
Interviews 17

Branding 18
CRG Logos 18

Event Resources 19
Hosting Successful Live and Virtual Events 19

External CRG Resources 21
Internal Contacts 23

Member Engagement Resources 24
Dear Colleague,

At CVS Health we continually achieve market-leading business results through a unified understanding of diversity and by applying that understanding to the work we do every day. Diversity at CVS Health is all-inclusive and impacts every facet of our business. While it certainly includes race/ethnicity and gender, we believe diversity is much more than race and gender alone.

We believe in genuine respect and understanding of all differences, similarities and complexities that exist among people. Recognizing this allows us to fully leverage our differences and optimize our similarities. It is those qualities that result in innovation enabling us to more effectively and creatively address complex business challenges.

Our approach to leveraging diversity as a company asset is grounded in four strategic objectives, which make up our Enterprise-Wide Strategic Diversity Management initiative; they are:

- **Workforce Representation:** Reflect the marketplace we serve and the demographics of our communities
- **Colleague Engagement:** Leverage workplace relationships by creating and sustaining a culture of inclusion
- **Talent Systems:** Optimize and/or create policies, practices, programs and procedures (4 Ps) that enable effective talent development
- **Marketplace Diversity:** Ensure alignment with and engagement of key external customers, clients, communities and constituents (4Cs)

Colleague Resource Groups (CRGs), also known in some companies as affinity groups, employee networking groups, or business network groups have evolved over the years from social clubs into corporate business partners. Today, CRGs exist not only to benefit their own group members, but to work strategically both inwardly and outwardly to advance the company purpose. At CVS Health the CRG program is a function that falls within the Colleague Engagement strategic objective. In addition to racial, ethnic-background and gender-based CRGs, we hope to bring these organizations together based on country of origin, religion, physical disabilities, military service, age, sexual orientation, health and many other parameters.

Participation in our CRG program is another avenue for colleagues to help each other understand and navigate through our corporate culture. Colleagues will also be introduced to mentoring programs and other professional development initiatives; as well as the opportunity to do fun and fulfilling community initiatives. Areas of participation that tie back to the business are not limited to, helping through focus groups and through attending external recruiting and networking events.

On behalf of Strategic Diversity Management, thank you for your interest in our CRG program.

Best Regards,
David Casey
Strategic Diversity Management

Our mission is to educate, equip and empower colleagues to effectively navigate differences and similarities, driving growth and innovation.

By engaging the skills, talents and perspectives of each individual we can better serve our communities and fulfill our purposes.
Introduction

What is a Colleague Resource Group?

Colleague Resource Groups (CRGs) are voluntary, colleague-led organizations that encourage personal and professional development, promote diversity and serve as a resource to CVS Health. Members of CRGs often share a common affinity such as ethnicity, gender, cultural identity, focus or constituency.

Our enterprise network of CRGs benefit both group members and the company. CRGs encourage members to participate in meetings, events and activities that advance the company purpose and support our communities. Groups of colleagues united through diversity and purpose increase colleague engagement, loyalty and productivity. CRGs are an exciting way to expand your professional experience at CVS Health and make meaningful connections within our team.

Colleague Resource Groups at CVS Health

Drive company and individual growth through a network of colleagues leveraging their collective range of skills, talents and diverse perspectives acting as a resource to CVS Health. Colleague Resource Groups provide opportunities for all colleagues to engage and contribute to their highest potential.

Why Have Colleague Resource Groups?

Colleague Resource Groups (CRGs) benefit the individual colleague and the organization as a whole. CRGs provide insight and advice to company leadership through a unique knowledge of particular markets, demographics and customers – particularly in relation to sales, customer service, marketing and product/service development. They can serve as company ambassadors at corporate events, community events and/or recruiting initiatives, as well as assisting talent acquisition through personal and/or group networks, while promoting CVS Health as an employer of choice.

Colleague Resource Groups can play a big role in the professional development of its members through networking, mentoring, and learning & development opportunities. They can act as a retention tool by empowering colleagues and helping them understand the company purpose, ensuring a positive sense of colleague connection and identity. Importantly, they can act as a focused communication channel between company leadership and colleagues to both receive information about company initiatives and providing input/feedback on company policies, practices and products/service and drive continuous improvement of building a culture of inclusion.

Other benefits are:

• Create a medium through which colleagues can reconnect with each other's interests, and identities;
• Increase opportunities for colleagues to get involved and meet other CVS Health colleagues;
• Promote leadership;
• Foster a sense of community within the CVS Health population.
Starting a Colleague Resource Group

Below are the initial steps to begin the process of forming a CVS Health Colleague Resource Group:

**Steps to Forming a Colleague Resource Group (or Chapter of one)**

1. **Initial Interest**
   
   Check the Colleague Resource Group page on myLife at [http://mylife/My%20Company/Culture/Diversity/Pages/ColleagueResourceGroups.aspx](http://mylife/My%20Company/Culture/Diversity/Pages/ColleagueResourceGroups.aspx) to ensure that the group you wish to create does not already exist. If you do not have access to myLife, myHR also has CRG resources available.

2. **Interest Meeting**
   
   Contact the Colleague Resource Group Program Manager to discuss your interest in starting a group based on a shared affinity. Contact can be made via email or phone. All emails should be submitted to [Sarah.Craver@CVSHealth.com](mailto:Sarah.Craver@CVSHealth.com)

   During this meeting you will discuss your relation to the company; the group’s designation as a group; number of other colleagues who are interested in forming the group; list of colleagues associated with the proposed group, if applicable; affiliations with other organizations; ideas for events, and any other pertinent information, senior leaders within the requester’s area that can be of support, etc.

CRG Program Manager will provide templates of required material that need to be completed prior to next steps. If you are interested in forming a Chapter, the CRG Leadership of the designated group will be involved in the meeting.

3. **Submission of Required Materials**
   
   After the Interest Meeting, the primary CRG contact will gather the necessary requirements depending on the group’s designation, and submit them to the CRG Program Manager and CRG Leadership. (See next page for a list of requirements)

4. **Approval**
   
   Once all materials are received, the CRG Program Manager, CRG Leadership and the Strategic Diversity Management Director, overseeing the business unit, requesting approval will review the documents. Once requirements are met, the CRG will be supported by CVS Health.

5. **Communication**
   
   If the group has approval to be recognized as a CVS Health Colleague Resource Group the CRG Program manager will arrange a meeting with other CRG leadership of the respective CRG, and when applicable engage Corporate Communications.
Criteria and Requirements for Colleague Resource Groups

In order to remain recognized as a CVS Health Colleague Resource Group, the group must be compliant with the criteria and requirements established by CVS Health Office of Strategic Diversity Management. Additionally, the group must adhere to all corporate standards in order to receive ongoing support and services.

CRG Structure

The Colleague Resource Groups are Enterprise or National in nature. Any new CRG that is formed establishes a Steering Committee that leads the direction and impact of the entire CRG, including any future Chapters. Each individual CRG Chapter maintains their own Leadership structure that executes on local initiatives.

Membership Requirements

A Colleague Resource Group must have at least ten colleagues who have demonstrated an interest in establishing and maintaining the group. This applies to new Chapter formations as well. Additionally, there should be at least five individuals willing to assume one of the group’s leadership roles, which are outlined below.

Colleague Resource Group Role Definitions

Outlined are suggested roles and responsibilities that would enable a CRG to execute on all CRG requirements. It is up to the specific CRG or Chapter to define additional roles and responsibilities to support their unique objectives.

Executive Sponsor is a Senior Executive asked to commit two years in role. The office of Strategic Diversity Management appoints the Executive Sponsor. When applicable, recommendations for Executive Sponsors are considered. Responsibilities include but are not limited to:

- Advocates and serves as senior executive leader voice of the CRG to the CEO
- Provides strategic guidance and oversight of the mission of the group
- Reviews and provides direction for CRG’s Business Plans and goals
- Acts as a liaison between the Chairperson and enterprise senior leaders when needed
- Represents the CRG at Diversity Management Leadership Council meetings, where applicable
- Creates and identifies opportunities for the CRG to connect with the business (e.g., use as focus groups, recruiting channels, etc.)
- Participates in key events sponsored by the CRG. If needed, helps indentify or provides, additional funding for the group.

Chairperson is a two-person role and is typically an exempt level colleague. Non-exempt colleagues interested in the role need approval from the Human Resource Business Partner. Chairperson position should rotate every two years to provide leadership development opportunities to other members. Responsibilities include but are not limited to:

- Oversight of the CRG’s mission, goals and activities
- Sets and executes the annual business plan while streamlining communications
between Executive Sponsor and each Chapter Chair
• Leads the Steering Committee
• Manages the annual goal process
• Creates an annual budget request to be approved by the Executive Sponsor; Allocates approved funds
• Acts as a liaison between members, Executive Sponsor, Corporate Diversity Team and other CRGs
• Promotes activism and membership
• Responsible for outlining succession of group leadership
• The Chairperson should have a solid understanding of the CRG’s mission, goals and operations

Committee Leads typically make up the CRG Steering Committee. They are CRG members who facilitate the planning of events and report out progress to the Chapter Chair or Chairperson. All colleagues are eligible for a Committee Lead role and are asked to commit one year to position. The CRG Steering Committee as well as individual Chapters should have colleagues in these roles; one focusing on the Enterprise and what the entire CRG is focused on and at the second is at the chapter level ensure alignment and execution within their geographic location. To ensure each CRG is a resource to its members, the business and the community, it is recommended that each CRG have the following committees and Leads:

• **Marketing / Communication** leads a committee to drive the value proposition of the group; creates and manages marketing and communication strategy for activities associated with the CRG. Manages the myLife, Shared Drive or SharePoint site for the group; works with Corporate Communications to promote group events
• **Marketplace Diversity** leads a committee to identify new or strengthen current community partnerships and the CVS Health brand. Ensure alignment between external customers, clients and communities.
• **Colleague Engagement** leads a committee to leverage current workplace relationships to sustain a culture of inclusion for all CRG members
• **Talent Systems** leads a committee to create opportunities that enable talent management. By optimizing or creating programs, practices or procedures that enable talent management the CRG contributing to the future state of the organization
• **Workforce Representation** leads a committee to identify opportunities where the CRG can impact the representation of the workforce to be reflective of the communities where our facilities are located

It is recommended that successors for the Committee Leadership positions come from the committee members to ensure a solid understanding of the CRG’s mission, goals and operations and to allow for leadership development opportunities.

**Chapter Chair** is typically an exempt level colleague. Non-Exempt colleagues interested in the role need approval from the Human Resource Business Partner. The Chapter Chair position should rotate every two years to provide leadership development opportunities to other members. It is recommended that the successor for the Co-Chair is a Committee Leader to ensure a solid understanding of the CRG’s mission. Responsibilities included but are not limited to:

• Oversight of the Chapter’s goals and activities
• Sets and executes local Chapters business objectives
• Leaders the Chapter leadership
• Responsible for outlining succession local of group leadership
• Engages with Chairperson or Steering Committee at least quarterly to ensure alignment

Chapter Co-Chair is typically an exempt level colleague. Non-Exempt colleagues interested in the role need approval from the Human Resource Business Partner. The Chapter Co-Chair position supports all of the Chapter Chair’s responsibilities. The Chapter Co-Chair is in line and learning the role of the Chapter Chair as their successor.

Group Administration / Secretary records meeting notes and event highlights. Responsible for maintaining an accurate account of members and manages updates to the Business Plan. Additional responsibilities assigned based on CRG.

Group Treasurer maintains the CRG Budget, allotment to Chapters and acts as a resource for Chapter with expense processing questions.

CRG Mission Statement

All Colleague Resource Groups must have a written mission statement outlining the purpose for its existence. The mission statement will serve as a guide for future programming and events and inform colleagues throughout the enterprise of the group’s direction. Each group’s mission should be a straight-forward, business orientated statement about why the group exists. The statement should directly support the group’s core values and must be aligned with the Purpose of CVS Health. All Chapter mission statements are the same as the National CRG.

Consider the following questions when outlining a mission statement:
• How will this group connect with the Company Values?
• How will this group raise colleague engagement?
• Who is the target audience the group wants to align with?
• Where has this group identify untapped business opportunities?
• What role can this group play in helping people on their path to better health?

CRG Business Plan

A CRG Business Plan is a document that outlines a group’s intent for 1-3 years. The Business Plan contains the CRGs mission, description, leadership structure and outlines how the CRG will support the four Strategic Management Objectives. In addition, any Chapter aligned with the group is required to outline how the individual Chapter is supporting the CRG at their location. The Business Plan also provides opportunity to capture strategic accomplishments for the previous year. The Business Plan is due at the beginning of the year and is reviewed and approved by the office of Strategic Diversity Management. This consolidated document is to be updated throughout the course of the year as new Chapters form. Without an approved Business Plan the CRG is not recognized by the organization. The CRG Business Plan Template is available on myLife and the CRG Shared Drive.

CRG Budget and Forecasting Expenses

At the end of the year each CRG is required to submit a consolidated budget proposal to the CRG Program Manager, which outlines the forecasted expenses for the following year. This budget will be reviewed and once approved the CRG is responsible to submit their monthly forecasted expenses to the CRG Program Managed. For additional information see section on Funding. The Budget Template is available on myLife and the CRG Shared Drive.
Ongoing Requirements

To receive ongoing support, assistance, and services from the Office Diversity Management, Colleague Resource Groups must adhere to the following requirements each year of its existence.

Maintaining By-laws

The by-laws drafted by the group and approved by the Office of Diversity Management will serve as a guide for conducting the group’s activities. It should be followed consistently, and any changes must be reviewed by the Office of Diversity Management before they are implemented. Additionally, take special note of the following:

- Term limits for CRG Leaders: No one Leader can serve for more than two consecutive years.
- CRG Leader list: Following each election, an updated list of Leaders must be sent to the CRG Program Manager. Additionally, if an leader is changed prior to an election, those changes must also be submitted to the CRG Program Manager (along with the reason for the change).
- Minimum number of members: The group must maintain at least ten members.

Group Leadership Meetings

Each chapter is required to host a minimum of two meetings and one strategy session each year. The number of programming meetings will depend on the size of your group and number of events your group will host. At least two events are required.

Minutes of the leadership meetings should be submitted to the CRG Program Manager immediately following the meeting.

Programming Requirements

The group must conduct at least two programs/events per year. Program ideas include events such as multicultural heritage month programs, community events, recruiting, speaker, or networking events. All program ideas must be included in the CRG Business Plan and approved by the CRG Program Manager. Ideas for events that take place after the initial approval must be discussed with the Office of Strategic Diversity Management before planning begins.

Quarterly Touch-base

A CRG Leadership call will be hosted quarterly. The Chair and/or Co-Chair of the group is required to attend. The meeting is optional for chapter chairs. The call is a forum to share best practices, learn about newly formed groups, learn about CRG events and programs, and allow for question and answers.

Annual Report

An annual report must be submitted to the CRG Program Manager within the first month of every fiscal year the group is in existence. The report must include:

- The number of new members included in the group with name, title, department, phone, email, immediate supervisor and title;
- An updated membership list and names of leadership.

Colleague Resource Group Principles of Practice

All groups will conduct their activities according to the following principles:

- Support and promote the CVS Health’s Enterprise-Wide Strategic Diversity Management Initiative.
- Open membership and participation to ALL colleagues. (Contractors are not eligible to take on a leadership role.)
- Accurately promote the overall Purpose of the company and the Office of Diversity
Management Mission in a positive manner.
• Promote a spirit of service within the company and in the communities in which we operate.
• Strive to strengthen colleague engagement.

• Actively engage in communication with the Office of Strategic Diversity Management about event planning and for continual guidance and support.
• Accurately represent the interests of members and other colleagues.
• Create opportunities for ALL colleagues to participate in activities.
Funding

The Office of Strategic Diversity Management provides Colleague Resource Groups funding to be allocated for community events, charitable donations, speakers on diversity-related topics that align with their group mission and/or miscellaneous items that are approved.

A CRG is provided with a budget on an annual basis. This budget is to support all enterprise initiatives as well as Chapter initiatives. Each consecutive year’s funding will be based off of previous year’s volunteer hours and activities. The CRG Budget Template is available on myLife and the CRG Shared Drive.

Charitable Cash Donations: CRGs participate in many community events and support local nonprofit organizations. In some cases they may donate funding to help a local soup kitchen, a Boys & Girls Club scholarship or for participation in a community event.

Process to receive a Charitable Cash Donation:
• Nonprofit and donation amount need to be approved as a part of your Budget
• Request an Invoice from the nonprofit. Template available online if necessary
• Request the current W-9 Form from the nonprofit
• Submit documents to the CRG Program Manager
• Once paperwork is processed a check will be made out and mailed to the nonprofit within the CVS Health payment terms

There are other ways a CRG can get funding for a nonprofit they want to support. The Community Relations Office can support nonprofit donations in two ways:

Charitable In-Kind Donations: CRGs participate in many community events where they would like to donate CVS/pharmacy merchandise. In some cases they may donate merchandise to a shelter or to a diversity awareness organization. Process to receive an In-Kind Donation:
• Nonprofit and donation amount need to be approved as a part of your Budget
• Complete the In-Kind Donation Request Form, available on myLife and the CRG Shared Drive
• Submit In-Kind Donation Request Form to CRG Program Manager
• Merchandise will be delivered to the CVS location identified on the Request Form

Volunteer Challenge Grants:
CVS Health colleagues who volunteer regularly at a nonprofit organization can be eligible to apply for a Volunteer Challenge Grant. Challenge Grants ranging from $500 – $2,500 result in financial support for hundreds of nonprofits each year and are made possible by the CVS Health Charitable Trust, Inc.

To be eligible for a Challenge Grant, all community volunteer hours need to be tracked within Community Crew.

Community Grants: The CVS Health Community Grants program awards funds to nonprofit organizations for the following programs:
• Programs targeting children with disabilities
• Programs focusing on health and rehabilitation services
• Public schools promoting a greater level of inclusion in student activities and extracurricular program
• Initiatives that give greater access to physical event and play
• Organizations that provide underserved populations with needed care, in particular programs where the care received is of higher quality and delivered by providers who participate in accountable community health care programs.

The grant application process runs from January 1 through October 31. Qualifying organizations are eligible for grants of up to $5,000. To learn more contact the Office of Community Relations.

**Speaker Expense:** CRGs can host speaker events with diversity related topics that align with the mission of the group or CVS Health’s purpose. Process to receive funding for a Speaker:
• Speaker expense needs to be approved as a part of your Budget
• Complete the Speaker Request Form
• Request an Invoice from the Speaker’s organization
• Request a W-9 Form from the Speaker’s organizations if this is your first engagement with them
• Submit all 3 documents to the CRG Program Manager

**Miscellaneous Expenses:** CRGs have the option of using funds for activities or initiatives that are non charitable or speaker related. In some cases CRGs purchase banners, signs or posters with their group logo on it for branding purpose when they are participating in events. Additional suggestions include, thank you gift for a speaker, refreshments at a quarterly meeting, branded t-shirts for a community event, cost for leaders to attend a development event etc. Process to receive funding for a Miscellaneous Expense:
• All Miscellaneous Expenses need to be outlined and approved within your Budget
• An invoice needs to be provided to the CRG Program Manager for all expenses. Reimbursement will not be made without an invoice.
• The CRGs have contacts within Procurement to assist with identifying appropriate channels to purchase items as well as ensuring we are partnering with diverse suppliers. Contact the CRG Program Manager prior to placing any purchases to ensure the appropriate channels are being used. (See page 21 using a Diverse Supplier.)
• If you placed an order through a CVS Health cafeteria, you will need to receive the appropriate cost center prior to placing your order, once the order is placed you will send a copy of the order form (acts as an invoice) to the CRG Program Manager.
• If you charged a corporate or personal credit card you will need to submit an Expense Report through Cognos.

**Fundraising:** Before collecting money (or notifying constituents of the group’s plan to collect money), the group must work with the CRG Program Manager.
• Fundraising that is not in direct relation to a CVS Health sponsorship is prohibited.

**Collaborative Events**

The Office of Strategic Diversity Management frequently hosts events for colleagues, such as seminars and discussions.

A CRG may wish to partner with the Office of Strategic Diversity Management or contribute to the event, if the topic or subject relates to the interests of the group. Groups can contribute in a variety of ways, including having a table at the event to display information about the group, or help in the outreach.
Communication

Colleague Resource Groups are encouraged to communicate across the enterprise, their group message, any initiatives they may be engaging in, and any individual and/or group successes. Depending on where you are located the guidelines and resources for event communications will vary. Contact the Corporate Communications team prior to advertising to ensure that your message gets to those who need to hear it while staying within the guidelines.

**Communication Vehicles**

**myLife Intranet:** myLife has a number of different areas of the site to promote your event, including banner ads, home page feature stories (where appropriate) and location-specific pages with event calendars.

**CRG dedicated myLife webpage:** This page is maintained by the CRG and should be updated on a regular basis. myLife CRG sites are intended to be an informational resource where anyone in the enterprise can visit to learn more about what your CRG does, who to contact, news/event calendar, discussion forums, access most requested links and documents, etc. and used as the main source of advertising the group’s initiatives and achievements. Articles with photos and captions that recap events are recommended.

**News Article Page on myLife:** Within Site Actions, select ‘Create Page’. After selecting the ‘Create Page’ the ‘Create Page’ template will launch.

After entering a title and description, you will notice that the page URL has been automatically created for you; be sure to remove any special characters (i.e. ‘,’ -!, etc.) that may have been a part of your original title. Special characters in URLs can cause errors within certain myLife web parts. Select ‘(News Page) News Page with Image’ from the Page Layout list. After selecting the layout, click ‘OK’ and you’re ready to begin setting up your page content.

To get started, click in the blank editing area below the “Page Content” heading. You’ll notice that this activate a formatting toolbar that looks very similar to what’s available in MS Word. Most of the tools available work well, but the functionality for formatting bulleted/numbered lists does not and is not recommended. If bullets are required, using dashes “-“ for bullets is recommended.

**Important:** It is also strongly recommended that if you are copying and pasting content from another source (Word, PowerPoint, Publisher), that the content be pasted into MS Notepad first to strip out all of the formatting. The content should be reformatted (bold, underline, etc.) after it has been recopied from notepad and into the myLife news page content editor using the options available in the tool bar.

Finally, when posting your news story, be sure to pay special attention to your “Rollup Image”, “Description” and “Keywords.” (See Ex. 3) The image, title and summary will show up in content lists being displayed throughout myLife and a good image and description can really help your story stand apart from the rest.

All CRG news pages should also include at least one “Keyword(s)” that can be used by other content publishers, including Corporate Communications, to pull in all articles related to your group as needed. If using multiple keywords, each
unique word or phrase must be separated
“Keyword(s)”: CRG News AND your group's
specific Keyword. As long as you include
your CRG specific Keyword when creating a
News Page it will appear on
the CRG News Feed.

Group Specific Keywords:
Fit Cub: Fit Club News
Family Matters: Family Matters News
PRIDE: CFI News
Valor: Valor News
Driven: Driven News
PLEG: PLNG News
Abilities: Abilities News
BCRG: BCRG News
WSN: WSN News
APNA: APNA News
STEAM: STEAM News
OUTLIERS: OUTLIERS News

CRG Event Calendar: This calendar
captures all CRG events. It is the CRG’s
responsibility to add events to this calendar.
The Corporate Communications team has
reminders set up to pull event information
two weeks prior to event to include in the
weekly Lifeline Newsletter.

CRG Event Calendar:
http://mylife/My%20Company/Culture/Divers
ity/Lists/CRG%20Event%20Calendar/Calen
dar.aspx

• Adding an Event: Select ‘New Item’
  from the New tab. Add Content, Event
  Title, Start/Finish Time, Location, Details,
  Contact etc. Select ‘OK’. Your event will
  be added to the calendar.

• Editing an Event: From the ‘View’ tab,
  select ‘All items’. Select your event, click
  ‘Edit Item’, edit accordingly and save.

myLife Home Page: Corporate
Communications will conduct periodic
recaps of recent CRG events. All content
will be generated from the News Articles
created by the CRG. CRG articles that are

by a comma followed by a space.
not group specific (e.g., general CRG
strategy and operations) will be considered
on a more often basis.

Lifeline Newsletter: Lifeline is a twice-
weekly e-mail newsletter round-up of the
week’s top stories and events. Published
on Mondays and Thursdays, and distributed
to corporate colleagues. CRG Events that
are listed within the CRG Event Calendar
will be promoted through the Lifeline
Newsletter if available two weeks prior to
the date of the event. Please contact the
myLife team with questions about Lifeline.

CRG Newsletter: It is a best practice
to engage with CRG members on a
reoccurring basis and to ensure
engagement exists between events.
CRG specific newsletters are a great way
for this engagement. Frequency and format
is up to the CRG to determine what their
members need (within CVS Health brand
guidelines). Weekly, Monthly or Quarterly
newsletters are all used. Keep in mind that
most groups have some form of newsletters
and CRGs can benefit from providing other
CRGs content.

CVS Health TV: Where applicable,
these “digital posters” are an easy and
effective way to spread your message
throughout the Corporate facilities. Majority
of buildings have at least one TV located in
a high-traffic area and events, news and
information are cycled throughout the day.
Create an event within the CRG Event
Calendar and then forward the event to
Corporate Communications two weeks
prior to the date of the event to have it
advertised on the TV. All ‘digital posters’
must be within CVS Health Brand
Guidelines.

Telepresence: Some CVS Health facilitates
have the capability to conduct telepresence
meetings. You will need to reserve the two
video conference rooms (the sending room
and the receiving room). You will open a ticket with the IT Service Center indicating the meeting date/time/locations. This ticket will be assigned to Telecom Data Group, who then gets it connected prior to meeting time.

**Video Conferencing:** Speaker events are encouraged to be broadcasted to as many of your CRG Chapters as possible to benefit majority of members. Utilizing a video conference is one way to do so. You will need to book the endpoints (two or more rooms) and ensure that they are video capable. The rooms will either have a TV unit in it or one can be easily moved in. Send a calendar invite to your facilities' Telecomm contact for 30 minutes prior to the start of your meeting. This team will assist with dial up and verify that your meeting is online. Facilities that offer video conferences (not limited to):

- Regional Learning Centers (Boston; Detroit; New York City; Twinsburg, Ohio; and Washington, D.C.)
- Woonsocket, RI Campus
- Northbrook, IL Campus
- Scottsdale, AZ Campus
- Monroeville, PA Campus
- Irving, TX Campus

**Videotaping:** Corporate Communications will evaluate video requests on a case-by-case basis.

**CRG Distribution Lists:** Each CRG is responsible for tracking their membership. This tracking should include Employee ID and members’ preferred email address. Email is the main form of communicating with group members; especially in the field environment. Someone listed without an Employee ID and email address will not be considered a member.

**Corporate Voicemail:** The corporate voicemail system is capable of delivering a broadcast message to all voicemail users. Use of this system must be approved by Corporate Communications. Corporate voicemail is best used to communicate with targeted groups of colleagues, e.g., all District Manages, all management in a specific area etc. While it can be an effective tool for larger audiences when used sparingly, other channels have been found to be much more reliable at delivering messages to large audiences. Certain technical limitations of the current system also hinder its effectiveness as a broadcast communication vehicle.

**Sign Posting**

The use of posters and flyers is discouraged, as it detracts from the professional atmosphere of our corporate offices. Any signs posted must follow these guidelines:

- **DO** thumb-tack posters and flyers to bulletin boards in designated areas, provided that they feature company-sponsored information and do not violate our non-solicitation policy. Posters and flyers must be removed immediately following the event date or expiration date of the information. For questions on bulletin board postings, please contact Joanna Reatiraza in Human Resources.

- **DO** post modest signage on easels on the day of the event, provided that they are located near the event (i.e. directly outside conference area door when event is being held) and removed at the conclusion of the event.

- **Do not** post signs, flyers, etc. in public spaces (e.g., – hallways, bathrooms, building entrances). Flyers for team events may be posted within your department area.

- **Do not** affix signs, flyers, posters, etc. using tape, staple, glue or pins to any painted walls, wallpaper, glass surfaces or doors. Doing so can result in permanent damage to these surfaces (e.g., peeled...
Recommended Communications Timelines

**Brief event:** e.g., a speaker program – Begin communicating on myLife/CVS Health TV up to, two weeks before the event, with program details and registration information as appropriate.

**Multi-hour event:** e.g., fairs, clinics, product demonstrations – Begin communicating on myLife/CVS HealthTV two weeks prior to the event. Provide registration information if needed. If the event is in a highly traveled area like the cafeteria, you can expect that word-of-mouth will boost attendance, particularly if giveaways are offered.

**Non-solicitation Policy**

To maintain a proper business environment and to prevent interference with work and inconvenience to others, solicitation and distribution of material (including e-mail) by one employee to another is prohibited while either is on working time. Solicitation includes, but is not limited to, requests of any kind for funds or contributions to, or involvement in social, religious, political or other organizations or campaigns, and offerings of any kind of merchandise for sale. Distribution of printed or electronic materials, including brochures, flyers, e-mail or written literature of any kind, is prohibited at all times in any work area.

See the Employee Handbook for more information.

**Interviews**

Colleague Resource Group members should refrain from speaking on behalf of the organization without consent from Corporate Communications.
Branding

CVS Health, CVS/Minute Clinic, CVS/caremark, CVS/specialty and CVS/pharmacy each have specific branding guidelines. Colleague Resource Groups can utilize the respective logo and brand at all approved CRG functions and events. For additional information, contact a member of the Enterprise Brand department at EnterpriseBrand@CVSHealth.com.

CRG Logos

- Any logo needs to be approved by the Office of Strategic Diversity Management and Enterprise Brands. Contact the CRG Program Manager prior to designing a logo.
- Newly formed groups may design a unique logo that is a representation of the group.
- All CRG Chapters will utilize the same logo as the parent group.

Sample logos
Event Resources

Hosting Successful Live and Virtual Events

Given all of the large scale projects that are underway within CVS Health, attending a meeting, listening to the discussion, and effectively participating can be a challenge, especially with a large number of attendees. The following are tips for effective meeting preparation and facilitation.

Meeting Hosting Services:
• Ensure that the meeting conference bridge number is clearly identified in either the meeting invitation or the meeting agenda, or both.
• Ensure that LiveMeeting, GoToMeeting, Meeting Place, etc. links are clearly identified and delivered to all attendees in advance of the meeting.
• Validate that all links can be accessed by all attendees – whether the attendee is a colleague, vendor, client, etc.
• If any meeting service requires a software component to be downloaded to the meeting attendees' computers, identify the download installation time and any hardware/software requirements.

During the Meeting

The Facilitator’s Role:
• Identify yourself and your role, and the project you represent.
• Review the meeting goals and objectives.
• If you are facilitating at a physical office site, remember to equally address in-person and virtual attendees.
• Identify how/when Q&A will be taken:
  • Clearly repeat all questions. If hand-held microphones are available, have runners in the meeting room who can quickly move the microphone to the attendee asking a question.
  • Restate the answer and identify how it correlates to a topic at hand.

Before the Meeting

Meeting Agenda:
• Define the agenda in advance.
• Clearly identify owners (subject matter experts) of agenda items. Confirm the owner and his/her attendance.
• Time block each agenda item, if appropriate.
• Define meeting logistics, e.g. break times, etc.
• Publish the agenda in advance of the meeting.
• If in-person meeting attendance is required, identify who is required and give enough advance notice so that attendees have sufficient time to book travel in conformance with all attendees' respective travel policies.

Meeting Room Facilities:
• Secure a meeting room with an adequate audio system, including hand-held microphones.
• Perform a sound check before the meeting.

Network Access:
• Ensure that all off-site colleagues traveling to a physical meeting location are given proper instruction as to corporate network or Internet access. If limited network connectivity is available, let the attendees know.
• Defer question responses to a “parking lot” or the end of the meeting if the question is off topic.

• Recap the day’s activities inclusive of any/all decisions. If the meeting is a multi-day meeting, review the next’s day agenda and any changes thereto.

• Keep the meeting on topic. Time block the agenda if possible or appropriate. If meeting goes off topic and over time, the facilitator’s responsibility is to get the meeting back on topic and on time.

The Meeting Attendee’s Role:

• If Q&A has been restricted to a specific time or at the end of the day, respect this decision and hold all questions to this time or interval.

• When asking questions, identify your name and clearly state your question. If questions are held to the end of a meeting or to a meeting segment, identify the agenda topic, presenter, issue, etc. that triggered the question so that all meeting attendees understand to what the question relates.

• Read all meeting materials in advance, if advance materials were provided.

• Actively participate!
CRG Resources

**External**

**Diversity Best Practices:**
Free membership for CVS Health colleagues.
[http://www.diversitybestpractices.com/user](http://www.diversitybestpractices.com/user)
Username: CVSHealth
Password: CVSdbp

**Diversity Journal:**
Free internet subscription to Profiles in Diversity Journal.

**DiversityInc Best Practices:**
Free subscription to DiversityInc Best Practices.
[http://diversityincbestpractices.com/cgi-bin/custom/checkSubscription.cgi](http://diversityincbestpractices.com/cgi-bin/custom/checkSubscription.cgi)
Username: your email address

**Catalyst**
Free membership
[http://catalyst.org/](http://catalyst.org/)
Register with your email address

**ERGs & Diversity Councils**
Each CRG has a membership that can be leveraged. Contact your CRG Chairperson or the CRG Program Manager to inquire who holds the membership for your CRG

**Internal**

**CRG Shared Network Drive**
[\CVSCIFSP01\CRG](\CVSCIFSP01\CRG)

**CRG myLife**

**CRG Event Calendar**
Internal Contacts

CRG Program Manager: Sarah.Craver@CVSHealth.com

Supplier Diversity Contact: Raul.Suarez-Rodriguez@CVSHealth.com

Enterprise Brand Contact: EnterpriseBrand@CVSHealth.com

Community Relations Contact:

East Region: Jason.Graveline2@cvscaremark.com

Central Region: Quadra.Harris@cvscaremark.com

West Region: Jeffery.Garbe@cvscaremark.com

Rhode Island: Jennifer.Leigh@cvscaremark.com

Massachusetts: Faith.Weiner@cvscaremark.com

Using Diverse Suppliers

Promotional Items: CVS Health has a contract in place with Overture Promotions, a certified Women’s Business Enterprise. All CVS Health Employees have access to the Overture Website and are capable of viewing current promotional items, T-shirts and or branded merchandise, which are available to order. Please follow this link: www.cvsHealthpromo.com

If you are interested in an item that is not listed on this website, please contact: Linda O’Donnell, Sr Consultant, Procurement Store Supply - Corporate Purchasing at Linda.Odonnell@CVSHealth.com

Provide the following information to her:
- Description of the item you would like
- Quantities needed
- Your budget
- Cost center #
- Address to ship to
- Which CVS logo you need
- The date you need the items by
- Once she has this information she will conduct a quick bid between Overture and Swervepoint, another diverse supplier, to bid for best price.
- Once she receives the best price she will than inform the vendor that they won the bid and to contact the person requesting the item directly, to work out all the details.

Print Items: CVS Health has contracts in place with numerous diverse print suppliers. The CVS Health Print Team will facilitate a quote on your behalf. Please contact: Fred Felix, Sr. Manager, Print Production at Fernando.Felix@CVSHealth.com

Provide the following information to him:
- Description of the print job needed
- Does it include PII or PHI?
- Supply a print ready file; if you do not have one available, they will assist you
- Budget
- Cost Center #
- Address to ship to and your UPS Number
- Timeframe (Print Team needs up to four weeks’ notice)
- Approver Name of Invoices

Process will be as follows:
- Print Production Team assigned
- If additional information is needed, they will reach out to you
- They will obtain a quote
- Approve and release print job
Member Engagement Resources

Maintaining CRG Engagement

Maintaining leadership and member engagement may be difficult at times due to competing demands, position changes, and the time of the year. Below are recommendations for maintaining member engagement beginning from the day they join your CRG.

Member Interest: When a colleague joins your CRG via registration acknowledge this by sending a standard email template; example below. In addition, when a new leader joins your CRG you can send an automated email to the individual’s manager acknowledging their support of Colleagues Resource Groups at CVS Health; example below.

• Example Email to new Member

Thank you for your interest in CRGs! [ ] is the Enterprise Chairperson and [ ] is the Group Administrator to [ ]. You will be added to our distribution list and forwarded the notes from the last meeting.

Once added to the distribution list you’ll receive group updates, event invites and meeting details. To date, we do /do not have a [ ] CRG Chapter in [ ] but that doesn’t mean one can’t form! Let me know if you’d like to set up a call and discuss this option further. I look forward to working with you.

• Example Email to new Leaders’ manager

Dear Leaders:

My name is [ ] and I am the chair of the [ ]. We are one of the many Colleague Resource Groups throughout the enterprise that was formed as the key initiative of Strategic Diversity Management’s Colleague Engagement objective. I’m writing to inform you that [Colleagues Name] is an active member of our CRG. We’re proud to have [her/him] as an active member, but mostly excited about having [her/him] contribute to the success of our business plan.

Being a member of a CRG allows the opportunity for colleagues to network with hundreds of other like-minded colleagues who want to network and broaden their perspective of working and collaborating cross-functions; it allows active members to engage in various community volunteer efforts with the team; it provides leadership and project management opportunities by allowing members to participate on one of the many committees that serve as the foundation of our enterprise-wide Strategic Diversity Management initiative.

We are very proud to have [ ], as our Executive Sponsor. He and the rest of our Senior Leaders are highly engaged in this effort as part of our Colleague Engagement, and so this letter is to thank you for being supportive and ensuring that [Colleague Name] stay engaged.

When you meet with [Colleague’s Name] during his/her reviews, please acknowledge participation in this effort and note that it not only fulfills individual and organizational diversity goals, but it stirs a high level of engagement that our company is pushing forward.

Again, thank you for your support.

Leadership Competency Development Guide
The First Level Leader Competency Guide was altered to fit specific CRG scenarios. Some individuals are aware of opportunities for development; others with not as much leadership experience may need to first take a competency assessment on myHR, Career Management site. This assessment with help you narrow down the specific opportunities for development.

Step two, is to develop an Individual Development Plan (IDP) which outlines your areas of development and what action steps you will take. This is a great opportunity for manager to have visibility into your CRG responsibilities as well as recognize your accountability for your development. From your IDP you will know specifically what sections of the Leadership Competency Development Guide to leverage.

**Development Resources**

CRG Leaders will be provided opportunities throughout the course of the year to participant in development opportunities. These development opportunities are in webinar, seminar, or conference formats.

All CRG members have the opportunity to leverage webinars made available through corporate partnerships. Examples of topics include and can be accessed via the CRG page on myLife.