

The background is a colorful mosaic of small, irregular tiles in various shades of red, orange, yellow, blue, and grey. A bright yellow banner is positioned on the left side, containing the main text.

# Together we make things happen

EY professional networks guide

The EY logo consists of the letters 'EY' in a bold, white, sans-serif font. Above the 'Y' is a yellow chevron shape pointing to the right.

**EY**

Building a better  
working world



# Contents

A message from Karyn Twaronite, EY Global and Americas Diversity and Inclusiveness Officer.....	01
Overview.....	02
Structure, roles and responsibilities .....	04
Starting a new network .....	10
Enhancing an existing network .....	14
EY professional networks information release .....	20
EY professional networks application .....	22
Outcomes-based goal-setting template .....	24
Budget templates .....	27
Sample activity evaluation.....	28
Measurement examples .....	29





## A message from Karyn Twaronite, EY Global and Americas Diversity & Inclusiveness Officer

Early in my career with EY, I felt that women, as a whole, needed more support in addressing barriers. So, with the help of a few colleagues and EY management, we cofounded the Northeast Professional Women's Network. It was a mutual success. Not only did the network members become more visible at the firm, but our leadership appreciated our efforts and eagerly provided their own advice and sponsorship. We also had more access to role models, peers, influencers and friends, myself included. And this is just one of many examples of a network that personally benefited me and that I experienced from its creation.

Joining a professional network is a great way to make important connections of all kinds: with our peers, leaders, clients and communities. Our networks are grass roots-driven groups envisioned and led by our people. They welcome everyone in our organization, from those who identify with the network to those who are simply interested in supporting its members. In fact, the openness of our networks and the potential to reach a wide range of people are two reasons why I also actively joined and am a proud member of all EY Professional Networks.

I can assure you that our Americas Inclusiveness Team will strive to enhance connectivity across our networks, encourage active participation throughout the organization and uncover each network's true potential. The benefit of our professional networks to EY is clear – by helping us leverage our differences, we produce better firmwide results. This guide is intended to help anyone looking to join an existing network, serve in a leadership capacity within a network, advance the efforts of an existing network to the next level or start a new network. It is a compilation of successful steps taken across our networks to bring our best tips and ideas to you.

Remember, together we can make things happen – and enriching and connecting our networks is a great place to start. I look forward to our progress.

EY Global and Americas Diversity & Inclusiveness Officer



# Overview

## Mission of our professional networks:

Professional networks engage our members through magnetic experiences, leveraging differences that matter to connect with each other, the firm and the marketplace through inclusiveness activities aligned with our people culture, community and clients.

## What is the history behind EY professional networks?

Initially known as People Resource Networks and affinity groups, EY professional networks have been an integral part of our people culture for more than 20 years. We are leaders in creating a diverse and inclusive workplace and often share our best practices with the business community. Now we're taking our networks to the next level so that they better align with our evolving business strategy.

## What are diversity and inclusiveness?

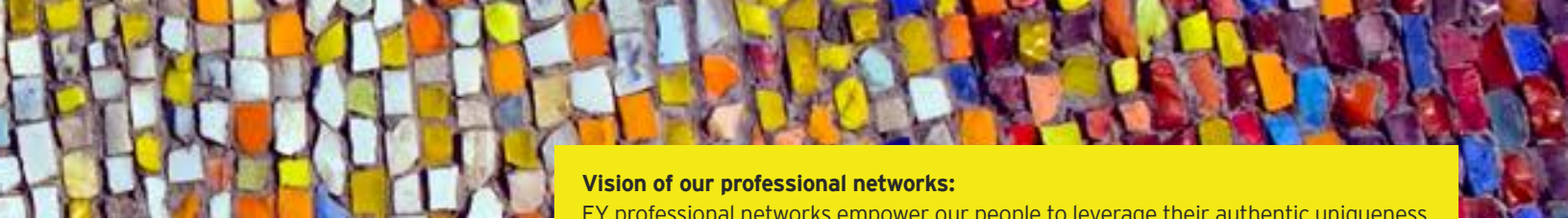
Diversity is about differences. Inclusiveness is about leveraging these differences to achieve better business results. To be successful and as a firm, we need both.



## What are EY professional networks?

EY professional networks are organizations formed around a shared set of interests, experiences or perspectives. Our professional networks help us to be diverse, in part by serving as an important recruiting tool. But they also make us inclusive. They say plainly that you can be yourself at EY and that you will always find people to support your individuality here. And because the networks can be started by anyone and welcome everyone, they help us build inclusive leadership.

While networks support firm diversity and inclusiveness goals, they also help members individually to learn about differences as well as each other and on the basis of shared interest in those differences.



**Vision of our professional networks:**

EY professional networks empower our people to leverage their authentic uniqueness to build a better working world.

**Which EY professional networks currently exist?**

- ▶ AccessAbilities (disabilities)
- ▶ Black Professional Network
- ▶ International Cultural Exchange Network
- ▶ Latino Professional Network
- ▶ Pan Asian Professional Network
- ▶ Professional Women's Network
- ▶ Today's Families Network
- ▶ Unity (LGBT+)
- ▶ Veterans Network

**Why join an EY professional network?**

Our networks offer tremendous value both to individuals and to the firm at large. Making connections through a network can add momentum to a career. And for the firm as a whole, networks can help us do the best possible job for our people, our communities and our clients.

Value to the individual		
Culture	Community	Clients
<ul style="list-style-type: none"> <li>▶ Motivating me and fulfilling my personal ambitions</li> <li>▶ Being myself and living my values in the workplace</li> <li>▶ Understanding and supporting my needs professionally and personally in a learning and development environment</li> <li>▶ Celebrating the differences of our work teams</li> </ul>	<ul style="list-style-type: none"> <li>▶ Having a sense of belonging at work</li> <li>▶ Encouraging relationships in the community</li> <li>▶ Influencing change in my community through change in my workplace</li> <li>▶ Knowing the firm supports causes I care about</li> </ul>	<ul style="list-style-type: none"> <li>▶ Developing my personal brand</li> <li>▶ Building relationships through my social and professional networks</li> <li>▶ Having a personal doorway into the marketplace</li> <li>▶ Serving my clients better through relationships across service lines</li> </ul>
Value to the firm, teams and individuals		
<ul style="list-style-type: none"> <li>▶ Developing workplace leadership and skills</li> <li>▶ Building peer and mentoring relationships</li> <li>▶ Recruiting and connecting with alumni</li> </ul>	<ul style="list-style-type: none"> <li>▶ Building relationships in more diverse communities</li> <li>▶ Collaborating with leadership on cultural changes</li> <li>▶ Aligning with corporate responsibility priorities</li> </ul>	<ul style="list-style-type: none"> <li>▶ Promoting our brand as an inclusiveness leader</li> <li>▶ Providing stronger business solutions and relationships for business development</li> <li>▶ Gathering knowledge and information to strengthen our business</li> </ul>







# Structure, roles and responsibilities

## Leadership structure

EY networks follow a general leadership structure depicted below and expanded upon in the following pages. While network chapters and members are the focus of these efforts, Americas leadership from the Americas Operating Executive to the Americas Inclusiveness Office provide support. Steering committees for each established underrepresented network provide consistency in strategy and direction. This support and consistency allows all of our networks, regardless of their structure, to leverage strategies, tools, knowledge and communications across the Americas.

## EY professional networks connect across the Americas

The majority of our networks at EY are empowered through local chapters located in a specific office or cluster of closely located offices. They generally connect and have coordination regionally as well as across the Americas Area. Local chapters set their own strategies, secure their own budgets and build membership through local activities and events.

Regional leadership determines how local chapters will form and work together. In smaller offices that don't have critical mass for a specific network chapter, the office may instead create more general combination networks, such as an "ethnicity" or "inclusiveness" network. In larger offices, larger networks might have subgroups based on rank or service line, such as the Professional Women's Network in New York. Regardless of how networks are structured locally, they connect at the Americas level through their respective steering committees. Representation of combination networks on Americas leadership teams comes through the larger firm-recognized networks.

### Network chapters

- ▶ Executive champion
- ▶ Inclusiveness and Flexibility Leader
- ▶ Network leader(s)
- ▶ Members

### Americas network steering committees

- ▶ Americas Operating Executive
- ▶ Americas network steering committee co-chairs
- ▶ Business unit network representatives
- ▶ Functional advisors
- ▶ Inclusiveness and Flexibility Leader
- ▶ Americas Inclusiveness Office consultant

### Americas leadership

- ▶ Americas Inclusiveness Advisory Council
- ▶ Americas Diversity and Inclusiveness Officer
- ▶ Americas network director

Communication and connectivity

Communication and connectivity





## Network chapters

- ▶ Executive champion
- ▶ Inclusiveness and Flexibility Leader
- ▶ Network chapter roles
- ▶ Network leaders
- ▶ Members

### Executive champion

Every network has an executive champion to provide leadership in the field. Executive champions for network chapters are appointed by their respective business unit managing partner for recommended two-year terms.

#### Executive champions commit to:

- ▶ Meeting regularly with business unit network leadership to advise on strategy and budget and develop local network leaders
- ▶ Advising on network business unit budget
- ▶ Participating in network activities and building personal relationships with members to better understand issues raised within the network
- ▶ Advocating for group concerns within the partner, principal, executive director and director (PPEDD) community and facilitating connections with other leaders
- ▶ Identifying opportunities for visibility for members and individual relationship-building
- ▶ Representing the group internally and externally, including representing the network on the business unit Inclusiveness Steering Committee

Network goals will be integrated into the executive champion's LEAD goals.

It is not necessary to be a member of the network's target demographic to be considered for the executive champion role. However, most fit one of two profiles:

1. Newer partner, principal, executive director or director who will benefit from a leadership development and visibility opportunity
2. Experienced partner, principal, executive director or director with connections, credibility and a passion for inclusiveness (less mature networks may require more senior champions)

### Inclusiveness and Flexibility Leader

The Inclusiveness and Flexibility Leader (IFL) is responsible for executing the diversity and inclusiveness strategy and working with local leadership and inclusiveness teams at the business unit level.

#### In this role, the IFL works with business unit networks in:

- ▶ Aligning overall network Business Unit strategy and goals
- ▶ Consulting with networks at a local level
- ▶ Managing Business Unit budgets

### Network leaders

Local network leaders, whether appointed or elected, are people who are passionate about their network's mission and work to build its members' skills, visibility and relationships. Ideally, these people will have leadership or supervisory experience and be active members of the network.

#### Network leaders commit to:

- ▶ Leading and facilitating team meetings, planning activities and events, and delegating responsibilities among team members
- ▶ Participating in network activities and representing the group internally and externally
- ▶ Teaming with the executive champion and IFL to develop local strategy and budget
- ▶ Advising and helping to develop network members while integrating network goals into personal performance goals
- ▶ Implementing local structure and leadership with committees as needed
- ▶ Sharing information and best practices among the networks and through knowledge-sharing tools

Where possible, co-leaders should be identified, with one rotating out of the leadership role each year. Part of being a successful network leader includes leader development and succession planning. Therefore, leaders should expect to rotate out of leadership after two years.

### Members

Networks are open to all EY people who wish to participate in good faith, including client-serving professionals, Core Business Services professionals, direct constituents and other interested persons. Members are expected to actively participate to further the network's goals. Participation may range from staying current with network-related information to leading the network or its activities. One becomes a member by joining the network's Global List Management System (GLMS) list.





## Americas network steering committees

- ▶ Executive sponsor
- ▶ Americas network steering committee co-chairs
- ▶ Business unit representatives
- ▶ Functional advisors
- ▶ Inclusiveness and Flexibility Leader
- ▶ Americas Inclusiveness Office consultant

Each network will be convened by a steering committee that develops an overall charter and strategy, sets priorities and goals, and requests a budget for Americas-level plans for the network. The co-chairs, business unit representatives, functional advisors, Inclusiveness and Flexibility Leader and Americas Inclusiveness Office consultant will meet four times a year, with an in-person meeting planned once a year.

The network steering committee is not intended to be a replacement for local leadership. It is an advisory board that sets strategic direction and provides a forum for sharing knowledge and coordinating efforts. Local chapter leadership determines which strategies to prioritize and leverage from the network steering committee.

Americas network steering committees provide the ability to organize and coordinate at the Americas level for even greater efficiencies and results. Leading practices in areas such as mentoring members can be developed with knowledge from the business units that have already implemented such programs. Sponsorships can be coordinated between local chapters to achieve greater benefits.

The network steering committees will have no more than 20 members each and will include the roles noted in this section.

## Executive Sponsor

Each network has an executive sponsor from the Americas Operating Executive to provide high-level strategic input, connectivity and support. Upon recommendation by the Americas Diversity and Inclusiveness Officer, each executive sponsor is appointed by the Americas Managing Partner for a two-year rotation, which may be extended. Sponsors will generally not be members of the network's targeted demographic.

## Executive sponsors are expected to:

- ▶ Meet and consult with Americas network steering committee co-chairs and steering committee
- ▶ Build personal relationships with members to better understand the network and members' needs
- ▶ Identify opportunities for the network for visibility, strategic alignment and individual sponsorship
- ▶ Identify opportunities to build understanding and help solve business challenges
- ▶ Facilitate connectivity with firm leadership and represent the demographic to the top levels of the firm





### Americas network steering committee co-chairs

Each network has at least two Americas network steering committee co-chairs to provide connectivity and leadership. After being recommended by the Americas Diversity and Inclusiveness Officer, each Americas network steering committee co-chair will be appointed by the Americas Managing Partner for 12-24-month rotations.

To be considered for an Americas network steering committee co-chair role, it is not necessary to be a member of the network's target demographic. However, you must be at the PPEDD level and have demonstrated interest and involvement in the network, as well as credibility.

#### Americas network steering committee co-chairs commit to:

- ▶ Leading and advising the overall network steering committee, which holds quarterly meetings
- ▶ Guiding and developing network executive champions and executive sponsors
- ▶ Identifying opportunities for external visibility for the network, strategic alignment, and individual networking and relationship-building
- ▶ Integrating network goals into their annual career development and performance goals

### Business unit network representatives

These representatives serve their business unit on the steering committee for a two-year term. Inclusiveness and flexibility leaders work with business unit leadership to identify the representative based on the following criteria:

- ▶ Staff 2/senior associate level or above
- ▶ Proven relationship-builder and change agent based on D&I involvement
- ▶ Demonstrated ability to bring new ideas, energy and perspective to the networks
- ▶ Experience in a leadership role within the local network or strong potential to take on a top leadership role in the future

#### Representatives commit to:

- ▶ Attending and participating in all steering committee meetings, including an annual in-person meeting in conjunction with a conference
- ▶ Working with fellow steering committee members to set strategic direction of the network
- ▶ Acting as an advisor to the larger committee on issues, concerns and ideas gathered from the field
- ▶ Creating and serving on teams/task forces to address specific challenges and efforts of their networks
- ▶ Sharing leading practices with fellow members within their geography or function

### Functional advisor

Advisors are identified to support the steering committee with their functional specializations, such as recruiting, corporate responsibility, supplier diversity and business development, etc. They will join for a two-year term, which may be extended.

#### Advisors commit to:

- ▶ Attending and participating in all steering committee meetings, including an annual in-person meeting
- ▶ Providing insights and integration with strategy in their functional space
- ▶ Serving on teams to address specific challenges and efforts of their networks
- ▶ Sharing network goals and challenges with their functional peers to connect and support steering committee efforts



### **Inclusiveness and Flexibility Leaders**

The Inclusiveness and Flexibility Leaders are responsible for executing the diversity and inclusiveness strategy and working with local leadership and inclusiveness teams at the business unit level.

#### **Inclusiveness and Flexibility Leaders are expected to:**

- ▶ Participate in steering committee meetings at the Americas level to share leading practices from other networks and consult on network strategy and goals
- ▶ Share knowledge from the network within a business unit and among the Inclusiveness and Flexibility Leader group
- ▶ Promote alignment of the steering committee, local networks and overall inclusiveness messaging

### **Americas Inclusiveness Office consultant**

Each network is supported by an Americas Diversity and Inclusiveness Office consultant to help with facilitation and knowledge sharing.

#### **Americas Inclusiveness Office consultants are expected to:**

- ▶ Participate in network steering committee meetings
- ▶ Oversee the network steering committee budget and monitor the return on investment
- ▶ Connect the network steering committee with relevant business groups and key leaders who may provide resource support

## **Americas leadership**

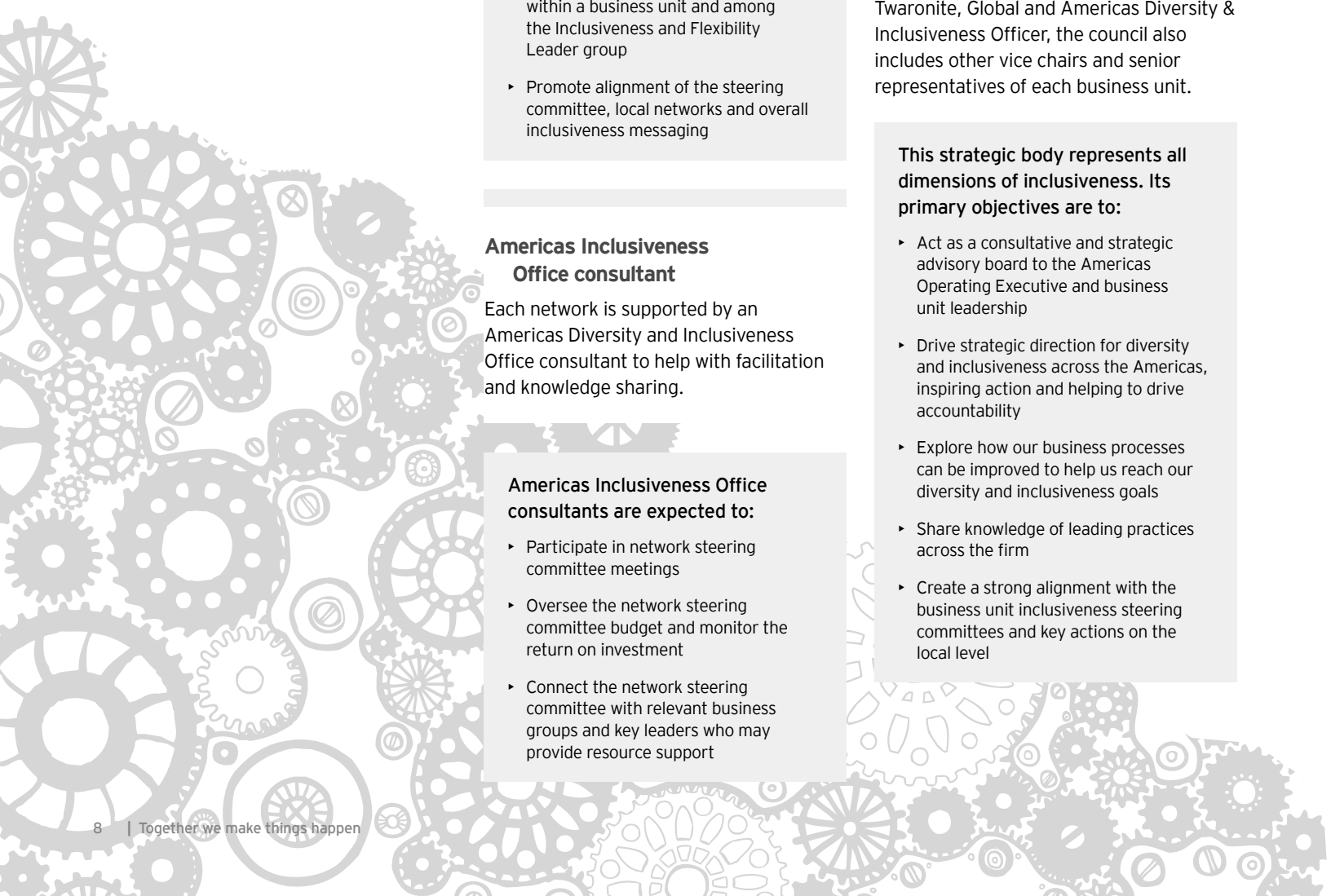
- ▶ Americas Inclusiveness
- ▶ Advisory Council
- ▶ Americas Diversity and Inclusiveness Officer
- ▶ Americas network director

### **Americas Inclusiveness Advisory Council**

Advising on EY's overall diversity and inclusiveness strategy is the Americas Inclusiveness Advisory Council. Co-chaired by Steve Howe, US Chairman and Americas Managing Partner, and Karyn Twaronite, Global and Americas Diversity & Inclusiveness Officer, the council also includes other vice chairs and senior representatives of each business unit.

#### **This strategic body represents all dimensions of inclusiveness. Its primary objectives are to:**

- ▶ Act as a consultative and strategic advisory board to the Americas Operating Executive and business unit leadership
- ▶ Drive strategic direction for diversity and inclusiveness across the Americas, inspiring action and helping to drive accountability
- ▶ Explore how our business processes can be improved to help us reach our diversity and inclusiveness goals
- ▶ Share knowledge of leading practices across the firm
- ▶ Create a strong alignment with the business unit inclusiveness steering committees and key actions on the local level







## Americas Diversity and Inclusiveness Officer

As a member of the Americas Operating Executive Subcommittee, the Americas Diversity and Inclusiveness Officer works closely with the Americas Inclusiveness Advisory Council, executive board, fellow partners and our people to maximize and further leverage the diversity that each person brings to the table – generations, cultural background, ethnicity, gender, sexual orientation, abilities, experiences and education – and to ensure that all our people feel included and valued.

## Americas network director

The Americas Diversity and Inclusiveness Officer has appointed an Americas network director to ensure that there is connectivity and leadership for the overall network framework and strategy.

### The Americas network director is expected to:

- ▶ Gather and share internal and external knowledge
- ▶ Consult with network leadership, at the Americas and local levels
- ▶ Facilitate Americas network leadership role assignments and succession planning
- ▶ Develop a plan for network leadership development
- ▶ Manage the approval process for new networks
- ▶ Advance all professional networks' internal and market connectivity
- ▶ Develop EY professional networks' brand as best in class





# Starting a new network

## 1. Set the stage

EY professional networks are grassroots organizations formed around a shared set of interests, experiences or perspectives.

When thinking about starting a new network, begin by connecting with those who share your point of view of what the network should be, as well as those who don't. Differing perspectives will strengthen your overall strategy and business case and are at the heart of EY's diversity and inclusiveness efforts.

To qualify for approval, the network must meet all the criteria described in the information release found on page 20. It is important to have a full understanding of the policy before submitting an application.

### Consider these questions before getting started:

- ▶ Is there a core group of people who can help with the development process?
- ▶ Will the network operate locally as an individual chapter, or will it connect virtually with other locations? Is there interest in other locations?
- ▶ How will the network empower and connect members?
- ▶ How will the network align with the firm's strategies and initiatives?
- ▶ How might the network collaborate with other networks to foster an inclusive culture?
- ▶ With which external organizations might the network connect to advance its efforts?
- ▶ How will the network build the relationships that lead to business growth?

Use the answers to the above to help formulate a plan of action.



## 2. Establish a team

Before you begin the network application process, identify your leadership team. Understand that diversity will strengthen your network at all levels.

### You'll need to create a leadership team that can:

- ▶ Put together the strongest business case possible
- ▶ Successfully get the network off the ground
- ▶ Build an identity for the group
- ▶ Get the network connected internally and externally

### The team should include:

- ▶ **A partner/principal advisor:** The insight of a partner/principal into the business case for the network will add significant value and credibility to the process.
- ▶ **A network strategy team:** This team will work to complete and submit the application. The strategy team should include both client-serving and Core Business Services professionals.
- ▶ **A Business Unit Inclusiveness and Flexibility Leader**

## 3. Determine the mission and purpose of your network

Developing a clear mission statement that outlines the purpose of your network will help you articulate the network's value to everyone else.



## 4. Construct the steps to success

After your leaders agree with the network mission, work out the steps you need to be successful. Think about the three strategic drivers of EY's network strategy – enhancing our culture and our relationships with our community and our clients – and the ways they match the needs and interests of your constituents.

All three strategic drivers are essential. However, a greater emphasis on culture and community in the beginning can make it easier to engage with clients later.





## 5. Complete the application

Pages 22-23 contain the new network application, which is designed to capture the full scope of your network's goals, structure and priorities. Be sure to include clear examples of how you will execute your goals.

Seek input on your application from other network steering committee co-chairs and the local or Americas Inclusiveness Team. Submit your completed application to the Americas network director.

## 6. Obtain approval for your network

The Americas network director will assess whether the initial criteria have been met and whether the proposed network meets business case requirements.

- ▶ If the basic criteria are not met or there are gaps in the business case, written feedback and suggestions will be provided. The submitter can then work with the Inclusiveness and Flexibility Leader, as well as other leaders, to address and resubmit the application.
- ▶ Upon General Counsel's Office approval, the application will be forwarded to the Americas Diversity and Inclusiveness Officer for final approval.





## 7. Start building the structure

Now that the network is official, the real planning and execution begin. Based on your mission and strategies, you must now consider goals, governance and funding for your network.

### Getting your leadership in place

Those who initiate the application process typically take on a network leadership position. They will hold the strongest understanding of the goals, roles and responsibilities of the network and its leadership team.

### Setting goals to achieve outcomes and requested budget

As part of the application, you used the strategic drivers of EY's networking strategies to develop priorities. Revisiting those priorities, what are the outcomes you hope to achieve in the first year?

Once your network has identified and prioritized its goals and activities, your leaders will need to compile a budget request. For an existing network, goals-setting typically takes place in March or April in preparation for the next fiscal year's budget planning. A new network may need additional time for discussions and approvals. Concise, measurable and well-aligned goals will have the greatest likelihood of approval.

Refer to the goal-setting and budgeting section that follows in Enhancing an existing network. See pages 24-27 for examples of goal-setting and budget-setting tools. These templates must be used for Americas budget requests.

Some locations have an overall inclusiveness budget. Funding is allocated on an ongoing basis as goals and activities are developed. Other locations determine their goals first and allocate funding on the basis of specific activity and event costs.

Local network budget requests are submitted to the Region Inclusiveness and Flexibility Leader by the local executive champion.

Americas budget requests are submitted by the Americas network steering committee co-chair to the Americas network director. Network steering committees provide guidance throughout the process.

## 8. Launch!

With plans and leaders in place, let people know about your new network. Our inclusiveness teams will provide support to help you develop a kickoff plan. The type of launch will depend on your network's size.

### You'll want to consider:

- ▶ **Communications:** These may include EY Home Page articles, voice mails, print media and kickoff event invitations. Consider how the tools identified on page 18 will build awareness of and connection within your network.
- ▶ **Kickoff events:** These can include both live and webcast activities with incentives for participation (e.g., refreshments, raffles, networking).

Build momentum early and look for every opportunity to publicize the network. Make sure your messaging provides a clear picture of why your network exists. Include the goals you have set, the people who are leading and supporting the efforts, and how others can get involved. Stirring up excitement early on will set you up for growth.

## 9. Assess success

New networks will have a two-year window to establish themselves, during which Inclusiveness and Flexibility Leaders and Americas Inclusiveness Office will provide resources and support as well as assess the success and sustainability of the network.

At the end of the two years, a review of the network will determine whether it has met or is making substantial progress toward its business case objectives and is fully inclusive and aligned with EY values.





**Build**

**Launch**

**Success**



# Enhancing an existing network

This section provides a blueprint for expanding the success of existing networks with an understanding of the tools and drivers of EY's professional network strategy. Creating stronger focused goals; leveraging resources better aligned to those goals; and clarifying roles, recognition and succession planning enable greater success and sustainability while providing a better return on investment for our members and the firm.

Networks go through different stages of maturity, usually starting with more of an internal focus and expanding outward. While we would like to see all of our networks at EY mature into market-leading practices, they need to do so at their own speed. Begin your update by determining where your network is and where it would like to be.



## Beginning

- ▶ Has informal structure
- ▶ Is internally focused
- ▶ Is event-driven



## Advancing

- ▶ Has formal structure
- ▶ Collaborates with other groups
- ▶ Plans strategic events
- ▶ Expands outward



## Leading

- ▶ Provides liaison to leadership
- ▶ Integrates network goals with business objectives
- ▶ Builds business opportunities





## 1. Determine network priorities with the three strategic drivers

**Culture, community and clients** – the three drivers behind our network strategy – can help you prioritize.

All three drivers are essential. However, an initial focus on culture and community is often necessary before engaging with clients. If your network is already strong in one or more aspects of our strategy, which do you need to focus on for balance?

## 2. Set goals and a budget for the upcoming year

Strong goals based on the three strategic drivers will provide value to both network members and the firm. Look for those activities and relationships that will have the highest impact on your network and will lead to successful outcomes.

### Consider:

- ▶ What are your priorities based on your network's strengths and maturity?
- ▶ Is the network relevant and meeting members' needs?
- ▶ Which activities are most relevant to achieving your goals?
- ▶ Which outcomes do you hope to achieve in the upcoming year?
- ▶ Which activities will take more energy or budget compared to outcomes provided?
- ▶ Which regional or local goals might you align with?
- ▶ With which EY strategies and programs might you work, such as recruiting, corporate responsibility, supplier diversity or Entrepreneur Of The Year®?

See the outcomes-based goals template on pages 24-26.



Goal setting typically takes place in preparation for the next fiscal year's budget planning, several months before the fiscal year-end. Whenever possible, network leadership should collaborate with their inclusiveness resource on budget development. Depending on the structure of the network, your resource will either be the Region Inclusiveness and Flexibility Leader for a local network or the Americas Inclusiveness Office consultant for an Americas-level or virtual network.

### Creating a budget request

Now that you have set goals and activities based on your priorities and identified desired outcomes, it's time to create a budget request.

Identify your goals and activities that require a budget. See the templates on page 27 for budget requests that are required for the Americas inclusiveness budget but may also be leveraged by

local networks. Templates are organized according to the strategic drivers and provide examples of potential goals and activities. They may be used to develop the processes of a robust network in a large office, a more general network in a smaller office or even a virtual network.

### Tips for successful goal setting

- ▶ Less can be more – it is better to succeed at fewer great activities than attempt and fail at too many
- ▶ Identify at least one collaborative effort with other networks
- ▶ Have a mix of activities with culture, community and clients or activities that cover multiple drivers
- ▶ Be specific with how you will measure your success in order to celebrate achieving success. Pages 24-29 include sample measures for goals and outcomes



### 3. Leverage your resources

You now have goals, activities and budget planning well underway. Do you have the right people and tools in place to help make it happen?

**Your leadership team should include:**

- ▶ Business unit executive champion
- ▶ Network leaders
- ▶ Committee and event chairs
- ▶ Americas network steering committee representatives

Role descriptions are found starting on page 5 of this document. When applicable, your network may also work with the Americas network director and the Inclusiveness and Flexibility Leader for your business unit.

There are many people who support local networks who can be very valuable contacts. Often, they need your help in seeing how your network can also benefit them in the process. People to consider involving in your network to help execute on your goals include the following:

- ▶ **Americas Talent Team** project managers who help with business unit inclusiveness initiatives
- ▶ **Recruiting professionals** who are both campus and experienced hire experts and can help your network integrate with recruiting efforts
- ▶ **Business development professionals** who can provide great sales skills and help members learn to leverage relationships built through the network

- ▶ **Community engagement coordinators** who focus on events such as EY Connect Day and can offer support during community fundraising events, such as an AIDS walk
- ▶ **Branding, Marketing and Communications (BMC) professionals** who can help get your message out to others
- ▶ **Creative Services Group (CSG) Design Studio** (Enterprise Support Services – a part of Core Business Services) can help you leverage SharePoint and other firm technology tools, design posters or lay out a newsletter. Tap into these skills to promote cross-service line learning and relationships.

Others you may only connect with occasionally, but who can make things easier, are **Meeting and Events Services (M&ES), EY Assist, Learning Coordinators, EY Knowledge, and Hospitality and Workplace Services personnel.**

All individuals and teams listed above will have a direct impact on the success of your network. Leverage their time, experience and skills to the fullest.

#### **Communications resources are important**

While communications efforts are time-consuming, they can help you leverage your impact more than anything else you do. See tips below on enhancing your success.

### 4. Execute

You have the goals, budget, tools and people. Now bring it all together by putting your goals into action. Remember that it's better to do a few things well than a lot of things poorly; do what you do right.

**Throughout the year, the network leaders should:**

- ▶ Connect quarterly with their leadership team for continuous strategy and planning
- ▶ Learn leading practices from other business units via their steering committee members
- ▶ Re-examine your current goals
- ▶ Monitor your budget
- ▶ Provide feedback and suggestions to your Inclusiveness and Flexibility Leader and to your Americas network steering committee representative
- ▶ Look for opportunities to collaborate with other networks on events and activities

#### **Here are a few tips:**

- ▶ Vary how you get your messages out – EY Home Page articles, social media and conference calls serve a purpose. Create a plan that considers what works best in each medium.
- ▶ Identify members who can help out to share the workload, e.g., if you create a newsletter, have multiple contributors. If you hold conference calls, rotate leadership. If you use SharePoint, figure out the security you need to share the work.
- ▶ For a local network, designate a local activities or communications chair who will manage distribution of communications, invitations and inquiries about getting involved. One key point of contact will develop consistency.







## 5. Evaluate

It's important to evaluate the work that you are doing in order to make good decisions about the future and to understand and celebrate the success of the past.

### Evaluate network goals and events

After every activity and as the calendar year draws to a close, network leaders should analyze the strengths and limitations of their efforts and network. Survey your members after events and any time you feel that involvement is dropping to help you determine what is working and what isn't. On page 28, see the sample activity evaluation recommended for every activity to assess achievement of the desired outcomes and to collect feedback for improvement. Use data gathered throughout the year to better gauge the needs of the target audience. Capture the information to improve and build goals during the budgeting process for the next fiscal year. Are you able to measure your success and return on investment? Refer to the outcomes-based goals document and measurement examples on pages 24-26 for examples of goal building with measurements in mind.

### Evaluate and recognize your people

Recognition is key not only to the success of your network, but also to the success of those participating in it. Contributing members should receive ongoing feedback.

- ▶ Network leaders should provide feedback to committee chairs and those going above and beyond throughout the year.
- ▶ Recognition awards, such as those given through the Recognition Award Center in the US and BBC, are a great way to thank those who have put forward extra effort. After every activity, the network leader can work with the executive champion to identify those who should receive recognition, along with the type of recognition and amount.
- ▶ Inclusiveness and Flexibility Leaders can share recognition and feedback with business unit leaders, including annual input for PPEDD participants.
- ▶ Executive champions should provide feedback for the network leadership during the 90-day cycle.

- ▶ Spotlight members who have shown leadership and accomplishment through your communications, and help them gain visibility throughout the firm.

### Evaluate for the future

It is never too early to start considering your network's next leader or leaders. Grooming someone to take over is the best way to guarantee the continued success of the network.

Seek people who already take an active role. Look for individuals who have invested and will continue to invest time and energy. Engagement is key. Members who have been highly engaged in the network will continue to push for success in the future.

Don't forget about your network alumni, those who have participated in the past but lately needed to focus their time and energy elsewhere. Re-engaging veteran members will bring fresh ideas and momentum back to your group. They can add a wealth of insight from prior efforts.

## Leveraging technology tools:

- ▶ **Yammer** promotes connectivity and enables sharing of what's happening across each network. Each network has an Americas Yammer group to facilitate collaboration across locations. Therefore, local-specific network Yammer groups are discouraged in an effort to create community and knowledge sharing across the broader network. Please note, Yammer groups should not be used as knowledge repositories, as posts that have been unacted upon for 180 days are automatically deleted.
- ▶ **SharePoint** provides numerous options for project management and shared work products. The Global D&I SharePoint site and Americas D&I SharePoint site provide information, resources and names of the Global Diversity & Inclusiveness Steering Committee, the Americas Inclusiveness Advisory Council, Inclusiveness and Flexibility Leaders and professional network contacts. An EY Professional Networks SharePoint community has been established to facilitate communications for each network while also enabling each to look across networks. Local networks are encouraged to leverage this SharePoint community to facilitate their communications as well.
- ▶ **The Global List Management System (GLMS)** includes subscription lists established for each network, which provide filtered lists for each location. Lists for membership sign-up can be found on the networks page of the Global D&I SharePoint site. For more information about using your local GLMS, contact your business unit Inclusiveness and Flexibility Leader or Americas Inclusiveness Office consultant.







# EY professional networks

## Information release

SCORE No. KK0830  
Distribution Americas personnel  
Issue Date: 18-May-2012  
Issuer(s): Nancy A. Altobello  
Issuing Function(s): People

### **EY professional networks**

This information release provides guidance on the purpose of EY professional networks (hereafter referred to as networks) and how groups qualify for recognition.

#### **Purpose of networks**

Networks are formed by EY employees who share common characteristics, experiences or purpose (e.g., gender, ethnicity, sexual orientation, age, physical abilities, veteran status, parenting). Networks are beneficial to individuals and the firm. They provide opportunities for members to connect in their communities, develop leadership skills and promote awareness around relevant issues. Members educate firm leadership on how to better support the needs of their group's constituents as well as leverage their insights in the marketplace.

Networks help foster an inclusive culture in which all people feel welcomed, empowered and valued. Participation provides the opportunity to leverage their differences for the benefit of our people and the firm.

#### **Application process**

To achieve formal recognition, each new group must undergo an application process certifying that its mission supports EY's inclusiveness mission and business strategy.

- ▶ Potential networks must submit directly to the Americas network director an EY professional network application (see attachment) aligned with the business case requirements below.
- ▶ Applications will be considered on the basis of business case criteria, sustainability and alignment with firm values.
- ▶ Formal recognition requires approval by the Americas Diversity and Inclusiveness Officer.

#### **Business case requirements**

- ▶ Potential networks must have a purpose/mission that supports the firm's inclusiveness mission and business strategy.
- ▶ Networks must be nondiscriminatory and open to all EY people who wish to participate in good faith, including client-serving, Core Business Services, direct constituents and other interested persons.
- ▶ Activities and resource investments must align with firm values and be inclusive in nature.
- ▶ Applicants must secure partner-level sponsorship and leadership.
- ▶ Due to independence and business case requirements, political groups are ineligible.
- ▶ Most important, the business case must address how the network will meet each of the following three components:






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#### **Our culture:**

- ▶ Engage and connect people with diverse perspectives
- ▶ Recruit, onboard and reconnect through alumni
- ▶ Empower and develop talent
- ▶ Foster an environment that is accessible, welcoming and supportive of personal and professional needs

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#### **Our community:**

- ▶ Connect to others and the community based on common affinities
- ▶ Leverage our internal community to connect with and support external communities
- ▶ Promote and support EY's reputation as an inclusive leader where we live and work
- ▶ Promote awareness, understanding, the celebration of differences and a sense of belonging

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#### **Our clients:**

- ▶ Enhance business relationships through our affinity networks
- ▶ Gather knowledge and information to strengthen our business
- ▶ Connect with potential clients, stakeholders and influencers through shared interests
- ▶ Build lifelong relationships with our internal and external clients

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#### **Recognition and resources:**

- ▶ Networks may use the EY and network names together (e.g., the EY Professional Women's Network) for signage, communications, events and marketing.
- ▶ Network participation will be recognized for each 90-day cycle as aligned to the Leadership at EY competencies, and used as a framework during 1:1 counselor discussions.
- ▶ Networks will have access to appropriate firm facilities and communications vehicles.
- ▶ Networks seeking funding must submit annual goals, budget requests and business plans to the or Americas network director. Funding should also be considered from relevant process owners and sources including, but not limited to, Inclusiveness Recruiting, Marketing, Community Engagement and Business Development.



# EY professional networks Application

Submit applications to Chris Crespo, Americas network director, as per the information release on EY professional networks, SCORE no. KK0830.

- 
1. What is the name of your proposed EY professional network? Please refer to our EY branding principles on The Branding Zone for guidance.

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  2. Who is your target audience?

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  3. All networks must be non-discriminatory and open to all EY people who wish to participate in good faith. Describe how your proposed network will be welcoming to everyone, including those with divergent perspectives.

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  4. Who will be the point of contact, and how many people are currently involved?

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  5. Who will be the PPEDD-level sponsor or leader?

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  6. What is the mission statement of your proposed network?

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  7. Outline how your proposed network will address each of the three strategic drivers guiding the EY professional. Include examples of professional development opportunities, potential speakers and other activities that may relate to each.



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**Our culture:**

At EY, we consider our people culture an important competitive advantage. We want to enhance our networks to strengthen that culture. Networks can empower each of us to develop personally and professionally. At the same time, they can help us learn how to be inclusive leaders by encouraging us to support each other. And they can attract a wide range of terrific professional people to the firm.

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**Our community:**

We want to improve our networks' ability to create internal communities; to give their members a sense of belonging; and, at the same time, to give back to the communities around us. We know that our networks offer a real opportunity to add luster to EY's reputation where we live and work.

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**Our clients:**

We want to empower our networks to connect us with internal and external clients and key stakeholders in the marketplace. We know that networks can improve our business relationships overall and build relationships within the firm that can improve client service. At EY, when we harness the power of our differences, we deliver the highest-quality work.

Note: If the network application is approved, your EY professional network will have the opportunity to request resources upon the submission of annual goals and a business plan to the local Inclusiveness and Flexibility Leader (IFL) or the Americas network steering committee co-chair for consideration.



# Outcomes-based goal-setting template

The following are examples of goals, outcomes and activities for each driver.

Culture – Engage and connect people with diverse perspectives; recruit, onboard and reconnect through alumni; empower and develop talent and foster an environment that is accessible, welcoming and supportive of personal and professional needs		
Goals	Desired outcomes	Possible activities
<ul style="list-style-type: none"> <li>▶ Develop networking, presentation, negotiation or leadership skills</li> </ul>	<ul style="list-style-type: none"> <li>▶ Evaluations from participants noting skill development</li> <li>▶ Obtain the number of participants at activities, number of people presenting or speaking and number of members in leadership roles</li> </ul>	<ul style="list-style-type: none"> <li>▶ Host training</li> <li>▶ Host opportunities to speak and present (e.g., lunch-and-learn)</li> <li>▶ Break up tasks to provide leadership skill development opportunities for more people, e.g., leading community outreach</li> </ul>
<ul style="list-style-type: none"> <li>▶ Engage and develop members</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increased retention and promotion of members</li> <li>▶ Ongoing feedback for all with leadership responsibilities</li> </ul>	<ul style="list-style-type: none"> <li>▶ Create mentoring pairs for lunches</li> <li>▶ Set up a mentoring program in network</li> <li>▶ Provide feedback tips – lunch, learn and do</li> </ul>
<ul style="list-style-type: none"> <li>▶ Attract recruits to the firm</li> </ul>	<ul style="list-style-type: none"> <li>▶ Integration of network into recruiting strategy and activities</li> <li>▶ Increase in number of members involved in recruiting process</li> <li>▶ Recruiting contact for network</li> <li>▶ Candidates recruited</li> <li>▶ Increase in number of recruiting events</li> </ul>	<ul style="list-style-type: none"> <li>▶ Raise awareness within recruiting team</li> <li>▶ Educate members on recruiting</li> <li>▶ Connect with professional associations and conferences</li> </ul>
<ul style="list-style-type: none"> <li>▶ Communicate successes of the network</li> </ul>	<ul style="list-style-type: none"> <li>▶ Contributions to Americas or business unit connections</li> <li>▶ Successful outreach or program</li> </ul>	<ul style="list-style-type: none"> <li>▶ Newsletters, social media</li> <li>▶ Conference calls</li> <li>▶ Meetings</li> </ul>
<ul style="list-style-type: none"> <li>▶ Identify improvements in benefits or policy</li> </ul>	<ul style="list-style-type: none"> <li>▶ A more inclusive work environment</li> <li>▶ Improved results of surveys among network members</li> </ul>	<ul style="list-style-type: none"> <li>▶ Research leading practices in other companies</li> <li>▶ Identify gaps in our policies or benefits through discussion, surveys</li> </ul>



**Community** – Connect to others and the community based on common affinities; leverage our internal community to connect with and support external communities; promote and support EY’s reputation as an inclusive leader where we live and work; promote awareness, understanding, the celebration of differences and a sense of belonging

Goals	Desired outcomes	Possible activities
<ul style="list-style-type: none"> <li>▶ Educate EY people on your diversity dimension</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increase in number of evaluations from people participating in learning events</li> <li>▶ Increase in numbers of events, trainings, communications, etc., in which educational tools or messages are included</li> </ul>	<ul style="list-style-type: none"> <li>▶ Host lunch-and-learns, webinars</li> <li>▶ Create tools and resources and integrate into existing EY activities or communications</li> </ul>
<ul style="list-style-type: none"> <li>▶ Increase network membership</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increase in number of people on mailing list</li> <li>▶ Increase in network presence in all locations</li> <li>▶ Increase in information distributed to new EY employees</li> <li>▶ Increase in diversity of membership</li> </ul>	<ul style="list-style-type: none"> <li>▶ Submit EY Home Page articles</li> <li>▶ Networking events</li> <li>▶ Onboarding and network friends and peers</li> <li>▶ Engage allies and diversity in network</li> </ul>
<ul style="list-style-type: none"> <li>▶ Work with other local EY networks to coordinate and align efforts</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increase in number of shared and combined activities</li> <li>▶ Increase in number of activity participants</li> </ul>	<ul style="list-style-type: none"> <li>▶ Network fair of all networks</li> <li>▶ Roundtable on shared challenges</li> <li>▶ Teaming on shared events or fundraisers</li> </ul>
<ul style="list-style-type: none"> <li>▶ Build connections so members feel a sense of belonging while expanding their internal networks</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increase in number of people participating in network activities and leadership</li> <li>▶ Increase in evaluations of network activities</li> </ul>	<ul style="list-style-type: none"> <li>▶ Networking activities, volunteer activities, recreational and cultural activities</li> <li>▶ Teaming on activities, projects or overall planning</li> <li>▶ Teaming on activities with other EY networks</li> </ul>
<ul style="list-style-type: none"> <li>▶ Collaborate with external organizations that share the network’s values and purpose</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increase in number of organizations the network supports with volunteer time, sponsorship, etc.</li> <li>▶ Increase in volunteering hours or participating in organization’s events and activities</li> <li>▶ Increase in number of members with leadership roles in organizations that also have client or target contact leaders</li> </ul>	<ul style="list-style-type: none"> <li>▶ Member participation in fundraising or sponsored events, volunteering, projects and other organization activities</li> <li>▶ Leadership opportunities such as becoming a member of the board of directors</li> </ul>

# Outcomes-based goal-setting template

**Clients** – Enhance business relationships through our affinity networks; gather knowledge and information to strengthen our business; connect with potential clients, stakeholders and influencers through shared interests; build lifelong relationships with our internal and external clients

Goals	Desired outcomes	Possible activities
<ul style="list-style-type: none"> <li>▶ Build relationships with clients and targets</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increase in events and activities that network members participated in with client and target colleagues</li> <li>▶ Increase in relationships updated in InterAction (CRM)</li> <li>▶ Increase in number of meetings to help businesses with network and D&amp;I efforts</li> </ul>	<ul style="list-style-type: none"> <li>▶ Shared events with clients and target company networks</li> <li>▶ Community activities in which client and target companies participate along with network members</li> <li>▶ Members' leadership in organizations that client and target contacts are very involved in</li> </ul>
<ul style="list-style-type: none"> <li>▶ Promote brand of EY as a leader in diversity dimension</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increase in number of presentations and speaking events</li> <li>▶ Increase in press mentions of activities</li> <li>▶ Increase in awards and recognitions</li> <li>▶ Increase in publications with inclusiveness ads</li> <li>▶ Increase in conference attendees branding firm</li> </ul>	<ul style="list-style-type: none"> <li>▶ Presenting workshops and sitting on panels at conferences or events</li> <li>▶ Convening roundtables with other companies</li> <li>▶ Connecting with other companies' networks</li> </ul>
<ul style="list-style-type: none"> <li>▶ Identify relationships that have developed into business</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increase in new projects or clients related to network activities</li> <li>▶ Increase in revenue secured or generated because of network relationships</li> </ul>	<ul style="list-style-type: none"> <li>▶ Meetings with new client and target contacts</li> <li>▶ Participating on project committees and other collaborations</li> </ul>



# Budget templates

## Sample budget for XYZ Office

Goal	Activity	Outcome/measure	Timing	Expense	Planning hours*	Comments
<b>Culture</b>			<b>Total</b>	<b>\$3,000.00</b>	<b>68.0</b>	
Build momentum and increase membership	Annual kickoff meeting open to the entire office	<ul style="list-style-type: none"> <li>▶ Increase membership by 5%</li> <li>▶ Share goals and find more "doers"</li> <li>▶ Provide insight into goals/activities for the year</li> </ul>	Annual	\$2,000.00	20.0	Holiday gathering and networking
Encourage networking among members/leaders	Quarterly networking lunches	<ul style="list-style-type: none"> <li>▶ Six network members, two leaders, to build connectivity/relationships</li> </ul>	Quarterly	\$800.00	8.0	Builds relationships among members and network leaders; exchange of ideas, suggestions
Develop leadership skills	Identify opportunities and best person to fill them	<ul style="list-style-type: none"> <li>▶ 10 people named to leadership roles</li> </ul>	Annually	-	20.0	Outreach, goal-setting, feedback and coordination
Enhance presentation and networking skills	Lunch-and-learn networking led by network members	<ul style="list-style-type: none"> <li>▶ 40 attendees</li> <li>▶ Evaluations</li> <li>▶ Two new presenters</li> </ul>	September	\$200.00	20.0	Lunch and two facilitators
<b>Community</b>			<b>Total</b>	<b>\$500.00</b>	<b>15.0</b>	
Give back to external community	Day of service	<ul style="list-style-type: none"> <li>▶ 50 volunteers</li> <li>▶ Partnership with another network</li> <li>▶ Evaluate at post-event lunch</li> </ul>	May	\$500.00	10.0	Expense for food/supplies for day of service
National association	Support a membership drive	<ul style="list-style-type: none"> <li>▶ Increase membership</li> <li>▶ Brand EY as a market leader</li> </ul>	Annual	-	5.0	Attend meetings – dues/fees paid by business unit
<b>Clients</b>			<b>Total</b>	<b>\$3,500.00</b>	<b>15.0</b>	
Increase presence in the market	Black-tie dinner	<ul style="list-style-type: none"> <li>▶ Table of 10</li> <li>▶ Including leaders/members in recognition for work over the last year</li> <li>▶ Networking opportunity internal and external</li> <li>▶ Leadership team will review post</li> </ul>	November	\$3,000.00	5.0	One table plus sponsorship
Engage the market	External networking event with clients, potential clients, employee resource groups	<ul style="list-style-type: none"> <li>▶ Add 15 names to InterAction database within the year</li> <li>▶ Continued strategic alliance for building potential business with target</li> <li>▶ Strong network/relationship building for member</li> </ul>	August	\$500.00	10.0	Networking with AT&T and JCPenney
			<b>Office total</b>	<b>\$7,000.00</b>	<b>98.0</b>	

\*Planning hours are defined as time spent to create, execute or attend projects/events to accomplish the desired goal

# Sample activity evaluation

**Name of event**

**Objectives and/or measures of success**

Objective/measure one:

Objective/measure two:

Objective/measure three:

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Were the objectives noted above met?	Exceeded	Met	Some met; some not	Not met
Would you participate in this event again or in a similar event?	Yes	No	Maybe	

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**Open-ended questions**

What suggestions do you have to make it better?

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What was your main takeaway?

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What will you do differently as a result of this event?



# Measurement examples

## Creates awareness for our people

- ▶ Event evaluations and attendance, including PPEDD
- ▶ Number of meetings with leadership on challenges and opportunities
- ▶ Number of network members involved in office advisory forums representing diversity dimension
- ▶ Number of meetings with EY Unplugged participants
- ▶ Number of campus hires and experienced hires joining network

## Builds connectivity, relationships and engagement

- ▶ Global People Survey results – engagement dimension
- ▶ Client Assessment of Service Quality results
- ▶ Number of relationships entered into InterAction
- ▶ External awards and D&I marketplace brand
- ▶ Indirect measure: new client work
- ▶ Number of media hits generated externally
- ▶ Growth in size of network
- ▶ Entrepreneur Of The Year nominees

## Provides development and leadership experiences

- ▶ Number of PN leaders promoted to PPEDD
- ▶ Number of recruiting referrals made by network members
- ▶ Leadership roles in external organizations sponsored
- ▶ Opportunities for members to achieve goals (e.g., presenting, meeting leaders, project management skills)
  - ▶ Indirect measures: office retention
  - ▶ Office promotion rates
  - ▶ Campus and experienced hire results

## Drives operational efficiencies

- ▶ Drive achievement of an office goal such as volunteer hours, fundraising or visibility at a university
- ▶ Execute on corporate responsibility goals with focus organization or program
- ▶ Collaborate and host joint network events to reach more people

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