



# A Leader's Guide



## To Strengthen Unions



## Moving Beyond Diversity...



## Towards Inclusion and Equity



A Working Document  
September 2014

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# FOREWORD

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Nearly two decades ago, the Canadian labour movement took a hard look at the reality of racial discrimination in our workplaces, our society, and in our unions. The Canadian Labour Congress National Anti-Racism Task Force presented a disturbing but insightful report that called on the labour movement to take this issue seriously. Its framework for action touched on every aspect of how we operate, as well as crucial issues of racism in broader society.

Today, the makeup of the workforce is rapidly evolving. In greater Toronto, half of us were born outside Canada, and half of us are people of colour. The challenge to the labour movement everywhere in the country is whether we reflect those changes in our memberships and in our leadership and create more inclusive and equitable unions – or fall behind and offer little relevance to millions of our fellow Canadians.

This guide has been developed to help unions embrace change in a way that is effective and authentic. It is not an easy task. But of course, building a labour movement has never been a simple process. It takes skill, determination, courage, and an openness to change. It is a remarkable journey that working people have been on for many generations in Canada. I am confident that our activists and leaders have all those traits needed to take on this work, to learn from both our successes and our setbacks. Together we can craft a more equitable and powerful labour movement for the 21<sup>st</sup> century.

John Cartwright  
President, Toronto and York Region Labour Council

# INTRODUCTION

## UNION CONTEXT

A racialized member gets elected as a member of the bargaining committee. She asks, “What are the ‘equity priorities’ of our bargaining agenda?” She is told the bargaining agenda is supposed to meet “everyone’s needs,” and the union “bargains for the good of all.”

One of the resolutions at the union’s national convention proposed the establishment of a “designated seat for equity” as one of the executive officers. A delegate opposed the resolution, arguing: “All officers are responsible for equity. We should not confine the equity agenda to one position, department, or program.”

During an organizing campaign, a racialized member of the team complained of experiencing racial discrimination by a senior organizer. When she complained, she was told that the priority of the moment was “to win,” and that her complaint would be addressed after the campaign.

A racialized member with many years of community experience was hired as a new union rep. After a while, she felt that her community experiences were being de-valued, her skills under-utilized. When she voiced her concern, she was told that “she’s going through a learning curve,” considering that her community work experience is different from union organizing and representation.

“We are proud of the diversity of our union; our membership mirrors the community,” declares a union leader. “But why are racialized sisters and brothers under-represented in leadership positions?” Because, he was told, the union could not find enough “qualified” applicants for senior staff and elected positions.

At a meeting of the local executive committee, an item related to union diversity and equity was placed on the agenda. “Let’s save some time and give this item to the Equity Committee,” suggested the president. “Yes,” agreed another member, “that is their job.”

A white officer of the board, considered by many a strong ally in anti-racist work, was told by a fellow union officer: “You need to ease up on your racial equity rhetoric, otherwise we may experience a backlash against equity work. I have nothing against the equity agenda, but it should not be a divisive factor.”

These snapshots show challenges facing our unions. Equity is a theme in all. There are tensions and disagreements about goals and strategy, and even about the relevance and urgency of an equity agenda in unions.

Equity is critical for the survival, growth, and transformation of unions. If the union fails in equity, the union fails in its mission to its members and all workers. Equity builds the union, the union must build equity. It is in its own interest to do so.

This guide provides a framework for a meaningful exploration of these difficult and important questions. It is also a practical guide to planning for action. Equity cannot be left to chance: **leadership must take decisive and deliberate action.**

## WHY THIS GUIDE? WHO IS IT FOR?

Equity is a union issue. As front-line activists – members, officers, or staff – we face equity issues at every level of our union movement and every turn of activity:

- policy development, budget making, campaign planning, mobilization
- organizing, bargaining, political action, union governance

Equity is critical to the survival, growth and transformation of the labour movement. Governments and employers are determined to weaken every institution for racial and social justice and deny every worker their rights. All workers are under the threat of corporate globalization through privatization, service cuts and other austerity measures. Workers of colour – especially women of colour and immigrants of colour – are among the most vulnerable.

Every union campaign or activity includes an equity issue. Every program strategy and action should be informed by an equity analysis. Every union leader and activist should be ready with a handy set of tools for critical analysis, strategic planning, and creative action in response to racial inequality.

This guide is a leadership tool. It will help union leaders to make equity a priority issue, a union-wide concern, and a test of effective leadership. A leader must take up the issue of equity in order to effectively address issues of union survival, growth and transformation. Only in this way can a leader fully carry out his or her leadership mandate, and serve the union and its members.

This guide keeps in mind union leaders at the local level. Union structure and composition at the local level vary widely: from single-employer to composite locals, including multi-sector, and multi-industry locals. Large locals, small locals, new to long-established locals. The guide can also be adapted for provincial and national union levels, anti-racism and equity committees or departments, federations and labour councils.

This guide serves as your hands-on tool as you develop, implement and sustain a deliberate effort to create more diverse, inclusive, and equitable union organizations.

The guide focuses primarily on how to root out systemic racism as it operates in an organizational setting. Systemic racism is about more than individual acts of harassment or racial stereotypes. The guide describes a deliberate and sustained process of change to challenge systemic racism in a union context, and to transform the union to become a formidable force in building a social and racial justice movement.

## TWO ASPECTS OF AN EQUITY APPROACH TO EQUITY IN UNION-BUILDING

This guide uses an approach to equity that combines two aspects, or considerations:

*A practical consideration:* Equity works. It is a means to an end, a practical strategy to grow our union and build solidarity among all our members.

*A consideration of principle:* Equity is the right thing to do. It is a matter of principle. But it is not a question of choosing one over the other. The principle and practical aspects complement each other in the building of a more inclusive and equitable union. No equity, no union. This approach makes a “business case” for equity, providing a compelling reason for leaders to confront racism within our unions. At the same time, the approach frames equity work as a matter of justice: it is the right thing to do.

The chart summarizes the two sides of this approach to equity. There is not a hard division, but there is dynamic tension between these two sides. Examples of the tension are suggested in the Union Context snapshots.

A PRINCIPLED APPROACH TO EQUITY	A PRACTICAL APPROACH TO EQUITY
We do equity because <i>it's right</i> .	We do equity because <i>it works</i> .
Equity is a <i>moral imperative</i> .	Equity is in the <i>interest of union survival and growth</i> .
Equity is a question of <i>principle</i> , a matter of justice and human rights.	Equity is a question of <i>strategy</i> , a tool to grow and strengthen the union.
Equity is a goal. We work <i>for equity</i> .	Equity is a means to an end: we work for better contracts, with equity as <i>one of our tools</i> .
Equity brings justice to <i>equity-seeking groups</i> who are <i>directly affected by the injustice</i> .	Once barriers are removed, the <i>union benefits</i> from the greater participation of equity-seeking groups.

*Reference: Developed by Jojo Geronimo for Network for Better Contracts, Ontario Public Service Employees Union (2000-2002)*

We need both sides, we don't need to choose one over the other. Being principled without being practical leads to no results. Pragmatism without principle lacks vision, becomes hollow, and we would soon lose direction. Together, they work to produce lasting results for union growth and movement building.

## CENTRAL THEMES

The guide uses the following central themes as starting points:

- *Equity work is critical and central* to the survival and growth of the union. Equity builds the union. The union must build equity into its practices, policies, and programs.
- *Racial equity: race matters.* A race-based approach makes a difference. It is not possible to do diversity or equity work from a race-neutral perspective.
- *Equity analysis integrates race, class, gender, sexual orientation and other power relations (using an anti-oppression lens).* The guide focuses on the issue of racial equity.
- *Equity is a leadership task.* Leaders must act. Intentionality is key. Equity work must be explicitly prioritized and carried out in a planned, deliberate and systematic manner.
- The process involves *organizational change*, a decisive and deliberate approach to planned change. Equity must be integrated into the life and work of the union: its governance structure, programs, campaigns and staff relations.
- *The focus is on systemic racism.* Racial exclusion is rooted in structures and systems that appear to be race-neutral but exclude or discriminate against people of colour. The guide aims to create organizational change by addressing the roots of racial imbalance or inequality in unions.

### Systemic (structural) racism is not about people being mean

Unions are a movement, and also operate as organizations. They have a leadership structure, set program priorities, create systems, decide budgets, hire staff. Hidden within these structures, policies, and programs are *invisible or systemic forms of exclusion and discrimination*. In short, oppression. Specifically, racism.

Systemic racism happens when people assume that the “normal” ways of doing things are race-neutral. This ignores historical facts: society and its institutions of power – economic, social, cultural, and political – were built on racist assumptions, policies, and practices.

Systemic (or structural) racism happens when a policy or practice: (definition)

- is applied “equally” to all, treats everybody “the same way”
- is seen to be race-neutral in its consequences
- operates through the behaviours and decisions of groups and individuals, who may or may not intend to discriminate
- has a negative impact on certain historically disadvantaged groups

For example, a union may adopt a “universal” approach to organizing and can be considered to be “colour blind.” It does not appreciate the fact that certain groups are more vulnerable than others during an organizing campaign. Without ever intending to do so, this actually privileges certain groups and discriminates against others.



“Structural racism is a deeply rooted and continually evolving system of racial inequality that affects every institution and individual in our society... It is the normalization and legitimization of an array of dynamics – historical, cultural, institutional, and interpersonal – that routinely advantages whites while producing cumulative and chronic adverse outcomes for people of colour.”

Racial Justice Leadership Initiative, Applied Research Center, Oakland California (2004)



# DIVERSITY, INCLUSION, EQUITY

**Diversity** is about the external face of the union.

**Inclusion** is about the internal operations of the union, what is really happening, whether the union is welcoming of differences or not.

**Equity** is about results and how disadvantaged groups are impacted by what happens: who benefits and who gets hurt. It is about root causes of exclusion, and injustice.

**Diversity, inclusion, and equity** have overlapping meanings. Each term refers to a specific and unique aspect of fairness and equality. Together and separately, they serve as reference points that help mark your progress and evaluate results as you go through the different phases of building equity and growing your union.

The terms help describe the strength or weakness of the union's leadership composition, its systems and structure, and its policies and practices. Like vital signs, they give a "score" that reveals organizational health and effectiveness using an equity lens.

**Diversity** is about whether the union leadership reflects the general membership. For example, leadership can be considered racially diverse if it reflects the racial diversity of the membership. However, if it fails to address issues of racial inclusion and equity, the union may be diverse but "colour-blind." Being colour-blind assumes that the only thing that matters is the presence (or number) of members of colour. Colour-blind means ignoring the reality of racial discrimination in the middle of diversity.

**Inclusion** is about whose voice is heard, who is in and who is out. Inclusion is a measure of the active acceptance of and respect for all members, regardless of race. For example, an inclusive union demonstrates acceptance and respect by preventing incidents of harassment or overt discrimination. It promotes the rights of all its members, regardless of race. However, it does not have target-specific strategies or initiatives aimed to benefit members of colour.

A union may be diverse but not necessarily inclusive if its diverse members do not feel accepted or treated with respect. One strategy to enhance inclusion is to put in place "supportive measures" intended to benefit all, but with a particular beneficial effect on some disadvantaged groups. For example, child care at union events will help parents, and female parents in particular.

**Equity** points to the fact that equity groups face "systemic barriers" that effectively exclude them – with or without the intention of anyone in particular. These barriers are built-in historically and operate in institutions and society in often hidden ways. They may be the union's "normal ways of doing things." To treat everyone "the same way" is to deny the existence of these systemic barriers.

An equitable union will make an explicit effort to identify and unmask these systemic forms of discrimination. An equitable union will put in place positive measures that are specifically directed to benefit members of colour, and to remedy historical disadvantages. The union will treat them "differently" because they experience barriers that others do not. The equitable union will work to empower disadvantaged members.

# GETTING STARTED

As a leader or activist in your local, you have decided to champion equity in your union. You have made a deliberate and conscious decision to remove the barriers preventing full participation by members of colour in the life and work of your union. You aim to actively promote racial justice in the policies, programs, and practices within the union. You are aware it will be a long-term commitment. Though your decision is a highly personal act, you also know that this will be a collective effort that will ultimately involve all union members, both racialized and non-racialized.

## WHERE DO YOU BEGIN?

You can pick up where others have left off, or you can support an on-going effort. Whatever you decide to do, you will make sure that you assess the overall current situation of your union organization.

Here are some initial assessment questions:

- Are there “burning” or urgent issues facing the membership?
- Are these issues related to specific programs or campaigns like organizing, bargaining, contract enforcement, political action?
- Were there incidents of racial discrimination or race-based complaints within the union?



Your union’s programs, campaign issues or specific incidents will affect how equity issues will be perceived, prioritized, and integrated into the overall work of the union. They can provide an opening for equity work. Or they can complicate your initial organizing effort to gain support. So it is important to do an assessment and weave it into your strategy for change.

The guide includes a number of assessment tools in upcoming sections.

## WHO WILL YOU WORK WITH?

You are seeking every opportunity to work with others and through the existing organizational structure – even if in the process, you may have to challenge or transform the structure itself. You may not know yet who your allies are in this journey, but one thing is sure. You will have to reach out across the length and breadth of your union.

Most importantly, you need to recruit, support, and promote the active involvement of racialized persons and members of other equity-seeking groups (i.e., Aboriginal members, women, LGBT, people with disability). In other words, you need to organize your working group – as mixed a group as you can possibly make: social identity (gender, age, ethnicity, sexual orientation), occupation, sector/division, geographical location.

You also need to share your leadership role with members of colour /other leaders. It is possible you will do this work with and through an existing equity or human rights committee, or a similar mandated group. Or you may have to set up one yourself.

You may begin your journey with an official mandate from the organization, based on certain policy or program decisions. Or you may do it informally in the initial stage, seeking official mandate later on.

In other words, there are many ways of starting the journey once you have decided to grow your union with equity as your goal and your means. Be creative. Equity work is, by nature, a creative process.

## WHAT WILL YOU NEED?

### A Framework

You need to develop a map or overall framework to guide you in this journey. What does it mean to adopt an anti-racism and equity framework? Why does it matter to this work?

To effectively promote equity, we need to be explicit about our approach. We should be able to explain the basis of our analysis and action. A framework helps us to do this. It serves as a tool to make transparent where we are coming from and what we intend to do about the issue. It helps us to be clear. It enables us to communicate effectively with our members.

To adopt an equity framework means:

- To acknowledge that racism exists, that there are unequal power relations based on race. Racism exists in all institutions of society. It exists in our unions too. Therefore, race matters in fully understanding union life. Our union programs and structures are not race-neutral.
- To develop a clear analysis of how systemic racism exists in an organizational setting. We need an understanding of how systemic racism works, that racism is not just individual acts or attitudes. Systemic racism is rooted in systems and policies that may seem neutral. It exists in spite of good intentions (and sometimes, because of good intentions).
- To take a leadership role and make an organizational commitment to remove racial barriers. This means taking action. Not to do so means staying neutral, allowing an unfair system to operate “as usual.” Neutrality means reinforcing systemic racism, even without intending to do so.
- To act in a deliberate and systematic way. We need to adopt a planned organizational change process and follow through.

Consider organizing a three-hour workshop to launch your equity project. Build the agenda around an equity framework:

- vision
- organizational context
- anti racism analysis
- key phases or process for planned change

Developing a vision statement is an excellent starting point to engage members and build a core of equity activists and allies among the members. It does not need to be elaborate. Below is an example.

A strong and progressive union is one:

- whose leadership reflects its membership
- where all members are actively engaged in all aspects of union life and work
- which pro-actively removes systemic barriers to participation and access to services by disadvantaged groups
- which systematically seeks to achieve diversity, inclusion, and equity in all its structures, programs and practices



## Tools for Analysis and Action

We also need a few useful tools for our journey. The next sections provide some samples. But tools are not magic formulas. You will need to adapt and change them to suit your union and specific situation. They are primarily thinking tools. They will help you develop a systematic process for doing things.

### ***Taking Action, Not Leaving it to Chance***

We know that workers do not automatically benefit from economic growth. The economic system, operating “normally,” favours the rich, the CEOs and global corporations. It excludes workers from benefits of productivity or economic gains. Unions seek to change the unfair system of income and wealth distribution. We organize and bargain, in deliberate and strategic ways.

In the same way, organizational systems and practices, operating “normally,” exclude and disadvantage racialized people and other equity-seeking groups. Unions need to change unfair organizational systems, policies, and programs. Change does not happen by itself. We need to act to identify and remove racist barriers, in deliberate and strategic ways.

# TOOLS FOR DIVERSITY AND INCLUSION

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Assessment tools help describe where the organization is at and help reveal possible equity issues. Carrying out an assessment will raise the profile of equity, increase everyone's awareness and empower those directly affected – especially members colour – to speak out and act. It will give a sense of urgency: we cannot afford to wait. This is a union issue. It is everybody's issue.

The assessment process will help your organization develop a common language. This will enable members and leaders to define and speak on issues of equity more coherently and effectively. A shared "language for equity" helps develop consensus, strengthen resolve, and set direction to the conversation.

## ASSESSING DIVERSITY: SOCIAL MAPPING

**Who are we? Who is where?**

### What this tool will do:

- ✓ create a demographic profile of your union's membership and leadership (who is where in the organization)
- ✓ indicate if there is a racial gap in your leadership structure
- ✓ raise critical awareness about issues of diversity and inclusion in a positive climate
- ✓ begin to develop a shared language and understanding about race and its role in growing the union
- ✓ weave equity into the union's normal agenda
- ✓ identify possible leaders and allies in integrating racial equity in the life and work of the union

Some practical questions that may come up:

- which demographic categories will you include?
- who will you survey: all members, a section, or a select sample of the union?
- how will you introduce the mapping exercise, for what reason?

### Example 1

There may be resistance to this effort. Some may say it can be divisive or will make disadvantaged groups even more vulnerable.

**What you can do:**

- Conduct a pilot, perhaps on a small or limited scale
- Conduct educational meetings to develop greater understanding and consensus
- Incorporate mapping into a current union campaign or initiative, such as organizing workplaces with mostly racialized members, or in bargaining campaigns where equity issues are prominent

**Example 2**

We already have data on the membership and leadership of the union, but we don't know what to do with it.

*You can ask:*

Does our leadership reflect our membership? If such data exist, how are these data analyzed and used to increase diversity and inclusion? If such data do not exist, is there a plan to start the collection and analysis of these data?

**Chart 1: Social Mapping Tool**

Note: Assume you are mapping an entire local (all members = 100%)

	A: Aboriginal Peoples			B: People of Colour			Total for Entire Local = 100%		
	women	men	total	women	men	total	women	men	total
<b>1. Membership (#)</b>									
<b>2. Leadership Positions (# and %)</b>									
Executive Officers									
Executive Board Members									
Heads of Committees									
Stewards									
<b>3. Non-Clerical Staff (# and %)</b>									
<b>Total:</b> Leadership and Non-Clerical Staff (# and %)									

Reference: *Education for Changing Unions*, by Burke, Geronimo, Martin, Thomas, and Wall, Between the Lines (2002)

## ASSESSING INCLUSION: CHECKLIST (STRUCTURE, POLICIES AND PROGRAMS)

What has been done? What is in place?

### What this tool will do:

- ✓ provide measures or indicators to track, monitor, or evaluate if the union is being inclusive in its systems, programs, or practices
- ✓ indicate the extent members of colour are integrated into the life and work of the organization
- ✓ identify how policies, programs, and practices of the union are respectful and accepting of various groups, especially those that are historically disadvantaged

Some practical questions that may come up:

- how do you focus or narrow down your assessment?
- what issues should you explore?
- what is the most practical tool to use: questionnaire, interviews, focus groups, or a combination?
- who should you involve?

**Checklist:** The checklist chart has yes/no or short answers, a simple way to begin. But more information is needed to complete the assessment. Here are some examples:

**Reporting:** Are equity reports and updates submitted? Do the reports include results and analysis of challenges? Who receives the reports? How often? What happens with the reports? Who monitors implementation?

**Equity Committee:** Are all seats filled? What do they do?

**Equity Policies and Procedures:** Are members oriented and trained on anti-harassment, anti-discrimination, or anti-racism policies and procedures?

**Designated equity positions:** Is there a position (elected, staff, appointed) dedicated to equity, diversity, human rights? Are there seats reserved for racialized members (elected or appointed) for:

- Executive committee?
- Program or campaign committees (bargaining, organizing, political campaign committees)?
- Delegates to union conventions or conferences?
- Delegates to training?
- Staff positions?



**Chart 2: Checklist: Structure, Policies, and Programs**

	Existing? Yes / No	Active? Very Active/ Somewhat/ Inactive	Reporting/ Accountability Mechanism? Yes / No
Committee or Structure on Equity / Human Rights / Anti-Racism / Anti-Discrimination / Anti-Harassment			
Designated equity positions			
Policy on Equity / Human Rights /			
Anti-Racism / Anti-Discrimination / Anti-Harassment			
Procedures on Equity / Human Rights / Anti-Racism / Anti-Discrimination / Anti-Harassment (includes enforcing, monitoring complaints and violations of regulations or policies)			
Equity / Human Rights Conference or training programs			
Plans or programs to prevent racial discrimination and promote racial diversity, inclusion and equity			
Are equity and anti-racist principles included in strategic plans or programs?			
Are equity and diversity goals part of operational programs or campaigns?			
Is interpretation available during major events to members whose language is not English?			
Are there translations of key documents, like collective agreements?			

Reference: *Social and Economic Justice Committee: Working Group Report* (Service Employees International Union: New York),  
co-authored by Jojo Geronimo and Phil Thompson (2004)

## Assessing Inclusion: Practices

How are equity-related policies and programs actually being implemented? Here are some sample questions to help you assess your practices.



### Collective Bargaining

- Are equity-specific bargaining priorities identified, monitored, and evaluated?
- Are bargaining guidelines from an equity perspective formally adopted and effectively communicated and enforced?
- Do you conduct a survey of members of colour's needs? Are they prioritized and integrated into the bargaining?

### Organizing

- How racially representative and inclusive are the organizing staff and activist-organizers?
- Are there anti-racism and equity guidelines for organizing, especially in racially-mixed workplaces and communities?
- Are organizers provided anti-racism training in the context of organizing and servicing?

### Complaints related to discrimination, harassment or human rights

Analyzing race-based discrimination incidents or formal complaints filed by members of colour is one way to monitor progress towards inclusion.

Prepare an inventory that includes:

- number of cases/complaints
  - filed/on record
  - resolved before going to human rights office or tribunal
  - brought to human rights office or tribunal
- length of time to arrive at resolution
- number of reports submitted to central/head office for monitoring or review

Analyze the inventory data by asking questions:

- Do the numbers indicate there is a safe climate for complaints to be heard? Or are people intimidated and silenced, directly or indirectly?
- Do practices and procedures show that the union is taking human rights and equity issues seriously? Are enforcement and accountability mechanisms working?
- Does the leadership of the union (elected officers and staff) take pro-active steps to prevent discrimination or harassment? Provide examples of steps or measures.

# HOW SYSTEMIC RACISM OPERATES IN ORGANIZATIONS

Equity goes beyond diversity and inclusion.

Equity work transforms and strengthens the union by going to the root-causes of racial division within the membership. It does this by looking directly into how the organization itself – without the leadership being aware of it – may be complicit with broader institutional racism that finds its way into the union.

Racism is embedded in the history and culture of Canadian society. Every institution within this society – economic, social, cultural, or political – is infected by racism. Racism is systemic. It operates sometimes even without ill intent or malice, even without our conscious awareness. Within each institution – including unions – systems and structures interact with organizational values and individual action or group behavior. Each action reinforces racism within the organization. Like a virus within the body, it will continue to spread unless something is done to stop it.

An anti-racism and equity framework looks at how systemic racism operates in an organizational setting. It breaks down how the organization effectively excludes people of colour through its systems, policies and practices that are, seemingly, neutral, but have a negative impact on people of colour.

Systemic discrimination (such as racism) is abuse of power. It denies equity-seeking groups their rights and prevents them from access to services, resources, or participation. Members of equity-seeking groups in society or in an organization experience “systemic barriers.” They are denied their rights in indirect and subtle ways.

Systemic barriers operate through policies and practices that are seemingly neutral and are uniformly applied to all but have a negative and differential impact on historically disadvantaged groups. The negative effect may be unintended. However, “impact” and not “intent” defines racism and other systemic discrimination.

Reference: Rosie Abella, Supreme Court of Canada

## BARRIERS AND BUILDING BLOCKS

What helps any organization to operate? There are five main components that make organizations run effectively:

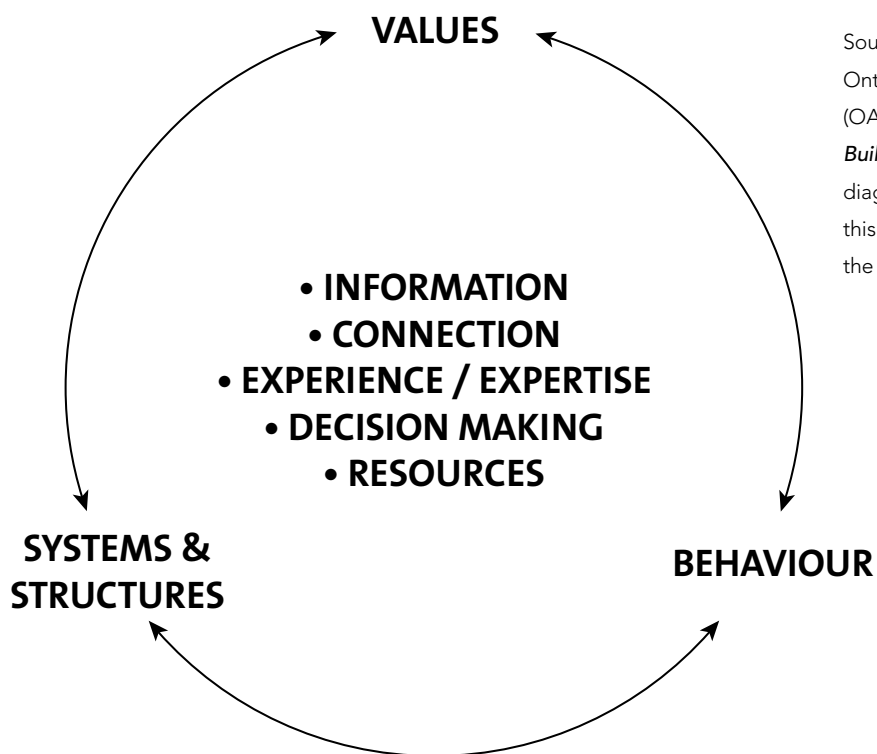
- Information
- Connections and Networks
- Experience and Expertise
- Decision-Making
- Resources

To the extent any of these components is weak, to that extent the organization as a whole becomes weak. To the extent the components are inclusive and equitable, to that extent the organization is inclusive and equitable.

These five organizational components are not race-neutral. They are programmed to systematically favour certain groups and discriminate against certain disadvantaged groups (like women, Aboriginal peoples, people of colour). These organizational components need to be de-programmed or changed through deliberate anti-racist interventions.

The following diagram shows the organizational components and how they act as barriers for members of colour.

### How systemic Barriers Operate in an Organization: A Framework to Analyze Systemic Racism



Source: Adapted from the former Ontario Anti-Racism Secretariat (OARS), Ministry of Citizenship, *Building Blocks to Equity*. This diagram and related materials in this guide are adaptations from the OARS document.

# TOOLS FOR EQUITY

This chart shows the overall process of building equity in the union. There are four phases – the 4 A's: assess, aim, act, audit.

<b>EQUITY</b>	Systemic barriers faced by racialized groups are identified, analyzed, and removed.
	Positive measures are put in place to bring about desired results.
	Efforts to promote diversity and inclusion are integrated into equity work, informed by anti-racism principles and practice.
<b>ASSESS</b>	The union acknowledges and analyzes systemic barriers experienced by people of colour.
	It does not assume that policies, systems, and procedures operate in a race-neutral way.
	Issues of diversity and inclusion are integrated into an anti-racism analysis.
<b>AIM</b>	The union develops positive measures to remove barriers and empower racialized groups to be actively involved in all aspects of union life.
	The union ensures that its plan for diversity and inclusion incorporates positive measures. Strategies explicitly address systemic barriers faced by racialized groups.
	Such positive measures are applied to internal union employment practices and union campaigns.
<b>ACT</b>	The union implements and monitors plans and programs. Plans include goals, activities, resources, timelines, and desired results.
	It ensures that members of colour are represented in the composition and leadership of the equity program in all phases, starting with the planning stage.
	The union puts in place developmental and leadership opportunities, specific to racialized groups.
<b>AUDIT</b>	It systematically implements its plan, including equity measures to remove systemic barriers to participation. For example: recruitment criteria explicitly address the historical disadvantage of members of colour.
	The union develops and implements an evaluation plan:
	sets up accountability structure
	conducts periodic monitoring and reporting
	collects and analyzes evaluation data on results and process
	reports to racialized groups, union leadership, and general membership
	provides feedback and consultation mechanism specific to each component (diversity, inclusion, or equity)
focuses on results: planned and actual systemic changes, benefits gained by racialized groups, and the extent equity practice is integrated into the overall work of the union (i.e., organizing, bargaining, political action).	

# ASSESS

## Assessing Equity: Identifying Barriers to Equity in Our Union

The union has assessed diversity and inclusion. Now we will assess equity by focusing on systemic barriers in the union organization. Below are sample assessment questions, grouped under the headings of the five organizational components:

- Information
- Connections and Networks
- Experience and Expertise
- Decision-Making
- Resources

These organizational components can be barriers to equity. But we can turn them into building blocks to equity.

When they operate in a “normal” race-neutral way, no thought is given to how they impact disadvantaged groups in negative ways. They act as barriers to participation and services for racialized members. However, they can be turned into *building blocks* of equity within an anti-racism and equity framework. Then they can promote the growth and transformation of our union.

### What this tool will do:

- ✓ Provide a deliberate plan to lasting change that leads to results
- ✓ Focus the effort on systemic change, going beyond diversity
- ✓ Give concrete examples of systemic barriers in a union setting
- ✓ Break down the steps of building equity, from assessment, to action, to audit or evaluation

### Some practical questions that may come up:

- What kind of information do we need to learn about systemic barriers?
- How do we gather the information?
- Who will conduct this investigation?
- How long does it take to complete this process?

### Assessment questions:

#### Information

- What values and assumptions does the union hold about information, especially as it relates to people of colour, their needs, and their capacities?
- What systems and structures exist for the exchange of information with racialized members, their communities and workplaces?
- What information does the organization have about racialized members in the union and in the communities? For example: Who are they? Where are they? What are their major issues and concerns? How are they portrayed by the union in its messages and images?

- How do members of colour receive and give information from and to the union leadership?
- What information do racialized members have about the union and its activities? For example: to whom does the union send information? How? Who defines and shapes this information? Is there a mechanism for a two-way communication between members of colour and union leadership?

### **Connections and Networks**

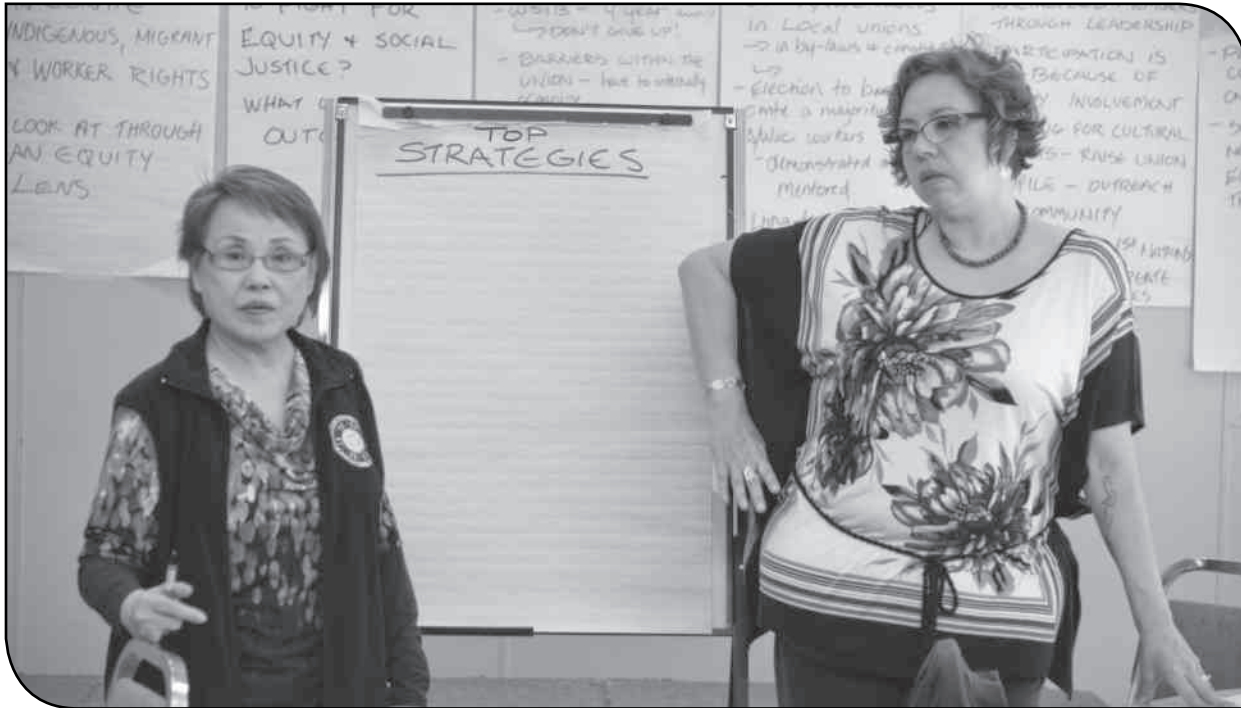
- What values and assumptions does the union hold about its connections with members of colour?
- What union organizational systems and structures exist to help on-going contacts with members of colour? What happens in practice?
- Do these connections lead to lasting and strategic relationships between the union and communities of colour? Are they mutually beneficial?
- How does the union establish connections with members of colour?
- Are the contacts inclusive of the diversity within communities of colour? For example: in terms of gender, sexual orientation, ethnicity and language, national origins, immigration status, etc.
- Are contacts respectful and consistent?
- Are the contacts two-way: communities of colour attend union events, and unions attend events of communities of colour?

### **Experience and Expertise**

- What values and assumptions does the union hold about the experience and expertise of members of colour?
- How does the union acknowledge and use the experience and expertise of its members of colour, in practical and respectful ways?
- In what ways does the union call on the experience and expertise of members of colour during the planning, development, and implementation stages of its programs, services, and campaigns?
- Does the union leadership have an appreciation of the disadvantaged position of members of colour in terms of participation in union activities?
- Does the union have ways to identify and develop the capacity of members of colour, in appropriate and effective ways?

### **Decision-Making**

- What values and assumptions does the union hold about the possible role of members of colour in decision-making and program planning?
- Are members of colour actively involved in decision-making that impact their lives and their participation in the union? Are there consistent and pro-active means to involve them?
- Is the union aware of the structural challenges that make participation of members of colour particularly difficult?



## Resources

- What values and assumptions does the union hold about distribution of resources?
- Are there systems and structures to ensure resources actually reach members of colour and directly benefit them?
- Are members of colour involved in the union's regular resource allocation and distribution process, such as budgeting?
- Do members of colour get access to union resources and services on a regular basis?
- Are there resources that are specifically targeted to address the needs of members of colour? For example: positive measures for mentorship, training, and other forms of accommodation.

## AIM

After you have finished your assessments, decide which organizational component is your priority. You will focus on changing a barrier into a building block: information, connections, expertise, decision-making, or resources. It will perhaps be better to select one or a few and do it well, rather than do all at the same time.

Aim to be strategic: choose those priority areas that will have a positive impact on the growth of the union and the empowerment of members of colour. Select those with a high probability of success, at least in the earlier stages. Choose those areas where there is an existing base of support.

Once you have identified the priority area of union work, you will then develop short and long term goals, and specific action strategies to achieve them. The next section describes these action strategies.



# ACT

A few action strategies are described below. Each one corresponds to one of the five organizational components, or building blocks.

These action strategies or initiatives are designed to promote equity. They are based on a deliberate decision to change racial imbalance or disparity and directly benefit historically disadvantaged groups. These initiatives are sometimes called “positive measures.”

An organization puts in place “positive measures”, i.e., initiatives specifically intended to directly benefit people of colour by providing remedy to long-standing or deeply-rooted racial injustice. If not directly addressed, such injustice would continue to discriminate against people of colour. A positive measure may be permanent or temporary, and remains in place until such time as the situation of injustice is substantially changed.

Each action strategy will require more detailed action planning and development, to include:

- Specific and measurable goals
- Key activities or milestones, with timetable
- Assignment of roles and responsibilities
- Ways to measure outcomes or results

STRATEGIES	BUILDING BLOCKS
<b>Engage and expand</b> on-going two-way communication between the union leadership and members of colour, their networks, or communities	Information
<b>Build and maintain</b> on-going relationship with members of colour, their networks, and communities	Connections and Networks
<b>Acknowledge, use and build</b> experience and expertise of members of colour	Experience and Expertise
<b>Involve and share</b> power with members of colour and networks	Decision Making
<b>Include and link</b> issues of equity with the union’s organizational cycle of planning and budgeting	Resources

## Strategies for Action: Building Blocks for Equity

### Engage and expand communication:

- Put in place communication and information mechanisms and initiatives that are specifically aimed at reaching out to members of colour and their networks within the union.
- Listen to what members of colour are saying, even if at times their ideas go outside “the way we do things around here.”
- Create alternative communication channels that promote members of colour to develop their own images and messages from their own perspective and experience as members of colour.

### Build and maintain long term relationships with communities and networks of colour:

- Develop long term relationships with networks of colour within the union and their communities outside the union. These relationships will go beyond the ad-hoc or special occasion contacts (such as Black History month or Asian Heritage month).
- Ensure relationship with communities of colour during campaigns is mutually beneficial and address needs of both union and communities.
- Build the capacity of communities and networks of colour as an integral part of any union campaign or program of action to achieve long term positive impact on both the union and the communities themselves.

### Acknowledge, use and build experience and expertise of members of colour:

- Create developmental and mentorship opportunities that are directly and exclusively aimed at members of colour. Customize the opportunities to meet their specific developmental and training needs. This is a “positive measure” with the goal of addressing long term racial disparity. Include goals and timetable.
- Put in place outreach and recruitment strategies specifically aimed at increasing participation of members of colour in the union’s regular training and development programs.
- Recognize, value and use the expertise and experience of members of colour whose language, immigration status, place of birth, or religion may be different from those of the “typical Canadian”.

### Involve and share power:

- Assign designated seats for members of colour and other members of under-represented groups in the union’s governance system (such as executive board positions, convention delegates, and other positions of authority). Include targets and timelines.
- Increase the participation of members of colour and networks in decision-making and policy development structures, and not just in reference to narrowly defined equity or human rights issues.
- In public events, union meetings, conventions and conferences, ensure that the main speakers or resource people include members or leaders of colour in meaningful roles

**Include and link:**

- Allocate resources (time, money, and staff) to equity initiatives. Examples include a mentorship program for members of colour or anti-racism education for all union leaders.
- Apply an anti-racism and equity lens to the union's priority-setting and budgeting process.
- Include equity issues in the union's regular planning and development cycle, or wherever priority setting and budgeting is involved. Do we identify and break down systemic barriers that operate during organizing, bargaining, or political action campaigns?



## AUDIT

To sustain the equity agenda, you need to monitor and evaluate both the results of your effort as well as the activities or process of implementation. Below are some suggested evaluation measures and criteria. As in the earlier phases, you will develop and implement your evaluation plan with reference to each of the five building blocks.

The union develops and implements an evaluation plan:

- sets up accountability structure
- conducts periodic monitoring and reporting
- collects and analyzes evaluation data on results and process
- reports to racialized groups, union leadership, and general membership
- provides feedback and consultation mechanism specific to each component (diversity, inclusion, or equity)
- focuses on results: planned and actual systemic changes, benefits gained by members of colour and the extent equity practice is integrated into the overall work of the union (i.e., organizing, bargaining, political action).

## ANALYSIS OF ACCESS, EQUITY AND POWER-SHARING: An Evaluation Tool

What do you evaluate? You evaluate result and also process (activities and strategies). Results and process affect each other.

### Evaluation of results

Here are some questions to help monitor and evaluate results of an equity effort or initiative:

#### Who benefits?

- Did the equity effort or activity benefit members of colour? Did it lead to greater representation and participation on their part in union life and activity?
- Did it increase access to union services and benefits?
- Did it lead to greater empowerment of members and leaders of colour in the way their voice and perspective are valued in the union's program planning and decision-making?

#### Structural changes?

- Are the changes created sustainable, i.e., will they last and go beyond a particular project?
- Are the changes imbedded in the structures and policies of the union so that equity is not a side issue or occasional concern, but a critical and sustainable part of union life?
- Is sufficient information and education provided to engage members in supporting the changes in the long term?

## Evaluation of process (activities)

Here are some questions to help evaluate whether your equity activities or process are effective:

- is it inclusive?
- is it equitable?
- is it on-going?
- does it lead to results: grow the union and empower members of colour?

Consider union structures, policies, or practices. Ask: how is information, development of expertise/knowledge, networking, decision-making, and resource allocation taking place?

More specifically, think of any area of union life and work: organizing, bargaining, service, member representation, political action, leadership, governance structure. Ask: what kind of changes was made in the policies, programs, and practices in each of these areas. Did the changes refer to systems and structures that will ultimately affect individual behaviour and organizational culture? Are there mechanisms to sustain the effort in the long term?

The chart below is a summary of some of these evaluation questions:

Criteria	Evaluation questions to be applied to policies, programs, and practices in any area of union life or work
Are we more equitable?	Did the initiative consider the built-in historical disadvantages of equity groups to participate effectively? For instance, what barriers to participation in the areas of organizing or bargaining were removed as a result of the equity initiative?
Are we more inclusive?	As a result, does our union program or structure reflect the diversity of the membership? Are diverse members more actively participating and engaged in meaningful ways?
Is equity work on-going?	Is the effort to be equitable and inclusive on-going and built into the structure and processes of the union?
Does it lead to results?	Who benefits from the programs or policies? Do historically disadvantaged groups end up actually participating and benefiting from the positive results of the program, policy, or practice of the union?

# CONCLUSION

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This guide has walked you through the basic steps to strengthen your union using equity principles and practice. You have explored certain tools to ensure that the union is diverse, and also inclusive in its programs and practices. Further, you have focused on equity-building tools that help you to systematically identify and break down long-standing barriers that prevent members of colour from full participation in union life and access to its services.

You acknowledge that equity work is a leadership priority. You have a vision to integrate diversity, inclusion, and equity into every aspect of the union. With equity, the members win.

There is no one best way of doing equity. There is no one best way of being a leader. Every situation is different. Learning, collaboration and vision are essential elements in this work. You will provide such elements using your insight and experience, while actively involving all the members.

We welcome your feedback on how to improve the guide. This will help other union leaders in the task of union transformation. We hope the guide has stimulated your imagination and strengthened your resolve to make your leadership count in our common endeavour.

Jojo Geronimo



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## ENDNOTES:

1. Page 2 - Why this Guide: The idea for this guide was inspired by The Canadian Labour Congress National Anti-Racism Task Force Challenging Racism: Going Beyond Recommendations (1997). The Task Force, formed at the 1994 CLC National Convention, worked with its affiliates through regional forums, federations, and the CLC Aboriginal Peoples Working Group and CLC Visible Minorities Working Group. In developing this guide, the author used many of the key themes contained in the Task Force report.
2. Page 3 - Chart 1: Principled vs. Practical Approach to Equity: Adopted from Building Equity Networks, developed by Jojo Geronimo for The Network for Better Contracts, Ontario Public Service Employees Union (2001).
3. Page 5 - Structural Racism: Quoted from Racial Justice Leadership Initiative, Applied Research Center, Oakland California (2004)
4. Page 6 - Diversity, Inclusion, and Equity. Adapted from the resource Advancing the Mission: Tools for Equity, Diversity, and Inclusion, by RESPECT, Anne E. Casey Foundation (2009). Excerpt:

Equity refers to the inability to predict outcomes by race/ethnicity. For example, equity will exist in high school graduation rates when we cannot predict that any given group has a better chance for this achievement than any other. Diversity focuses on representation of a range of groups in a given setting. Schools will be diverse if they contain students and staff from the range of racial/ethnic groups in a community. Inclusion is the active acceptance of and respect for all participants in a setting. Throughout the Toolkit these terms refer to groups classified by race and/or ethnicity, whose life experiences are either advantaged or disadvantaged because of such classification. (Footnote 1, page 7).

4. Page 11 - Social Mapping. Reference: Education for Changing Unions (2001), co-authored by Burke, Geronimo, Martin, Thomas, and Wall.
5. Page 13 - Chart 2: Checklist. Reference: Working Group Report: Social and Economic Justice Committee (Service Employees International Union: New York), co-authored by Jojo Geronimo and Phil Thompson (2004).
6. Page 15 - How Systemic Racism Operates in Organizations: This section has excerpts and adaptations from Building Blocks for Equity, a resource published in 1995 by the former Ontario Anti-Racism Secretariat (OARS) of the Ministry of Citizenship. The resource is part of Making Equity Work, a collection of anti-racism materials that formed part of a government and community effort to combat racism throughout the province. Using these materials, an anti-racism organizational change program was implemented, in partnership with a wide range of government ministries and agencies in the health, education, and economic sectors. The author and Marlene Green (deceased), of the former Doris Marshall Institute, helped implement this program, in collaboration with the staff of OARS and community groups in all regions of Ontario. When OARS was abolished, the program with all its materials was discontinued.



