

# LEADERS GUIDE TO EQUITY

*a Union Executive Workshop*  
**by JOJO GERONIMO**

## **Note to Facilitator:**

This workshop outline is meant to be accompanied by the *A Leader's Guide to Strengthen Unions – Moving Beyond Diversity Towards Inclusion and Equity* (Equity Guide). Any facilitator or discussion leader will need to be familiar with the contents and the concepts within the Equity Guide. It is also highly recommended that the facilitator attend a mandatory training session before guiding local unions through this workshop.

## **Assumptions about the workshop participants:**

- Are in the workshop on paid time, so that workshop can start and end on time
- Are union Executive and staff who are willing to explore and learn an equity-based approach to union growth and transformation
- Able to commit to a this 3-hour workshop

## **Goals of the Workshop:**

After the workshop, participants will be able to:

- Define key principles and concepts of systemic racism
- Identify different ways systemic racism works in a union context
- Explain the distinctions between diversity, inclusion, and equity
- Practice using a tool to analyze systemic barriers in an organizational setting

## **Time Required:**

- 3 hours

## **Materials:**

- Markers
- Tape
- Sticky Notes
- Chart paper
- Diagram: Spiral Model of Learning
- Copies of *A Leader's Guide to Strengthen Unions – Moving Beyond Diversity Towards Inclusion and Equity* for all participants
- Handout – Part 1: Mini Case Studies Activity
- Small slips of paper and pens (for informal survey)
- Tool Kit: Is this a case of Diversity, Inclusion or Equity?
- Short survey questionnaire to assess Inclusion and Equity
- Evaluation Forms

## Overview of Agenda:

a.	Getting Started	15 minutes
b.	Part 1: Break Out Groups and Synthesis	45 minutes
c.	Part 2: What's this got to do with the union or my leadership priorities?	30 minutes
d.	Break	10 minutes
e.	Part 3: Diversity, Inclusion and Equity	30 minutes
f.	Part 4: Snapshot of our Union	20 minutes
g.	Part 5: A Framework to Analyze Systemic Barriers	15 minutes
h.	Part 6: Strategies for Action and Next Steps	15 minutes
i.	Part 7: Evaluation	10 minutes

## Getting Started

15 minutes (Whole group discussion)

1. Facilitator to welcome group to workshop. Run through workshop objectives and provide overview of agenda.
2. Explain that in order to achieve workshop objectives and finish on time, it is expected that folks will be respectful with coming back on time from break and keep their focus by limiting cellular communication.
3. Ask: *What makes a group discussion safe for participation and respectful?*  
(Spend 5 minutes generating ideas from participants and charting responses onto chart paper – these will become discussion guidelines for the remainder of the day)
4. Explain the **Spiral Model of Learning** approach which starts from the experience of the individual participants, drawing out patterns while learning from each other, and strategizing together to build stronger unions.

## Part 1: Break Out Groups and Synthesis

45 minutes (Small group discussion and whole-group discussion)

5. Facilitator to explain that the goal of the next activity is to see how systemic racism operates through policies, programs, and practices (within our unions) in everyday seemingly neutral ways – without the deliberate intention or bad will of any one in particular to discriminate.
6. Facilitator to split the large group into mini groups (can be pairs, trios, or groups of 4s).

7. Explain that each group will be given a mini case that shows how equity challenges cut across all union activities (in delegate selection, leadership development, organizing campaign, and bargaining) and all union levels. Within their groups, analyze the scenario and answer the following:
8. What are the tensions and challenges in the situation?  
What is the impact on racialized members from the current situation?  
What are the assumptions or ideas behind the current operating principle?
9. Provide each group with a mini case and allow 15 minutes for break out discussion. Choose the cases that best reflect the situation of the local union.
10. Bring everyone back together. Have a report back from each group. (10 minutes) While participants are reporting back, facilitator to take notes of the reports.
11. After all report backs have been made, facilitator to lead whole group through synthesis of ideas – *how do these examples lead us to come to understand the term systemic?* Facilitator should draw on the experiences of participants as much as possible. (10 minutes)

Themes that facilitators may encounter: “normal ways of doing things,” “no intention to discriminate,” “race neutral operations,” “colour-blind thinking / assumption,” etc.

In all of these, ask the participants: *Who is negatively impacted? Are all groups impacted the same or differently? Who is left out?*

12. Debrief activity with group. Was this learning process difficult or challenging? Were the scenarios realistic? Have we encountered them in real life?

At another level, ask: How do people feel about the exercise?

If folks report that they felt threatened, uncomfortable, confused, or anxious, affirm that discomfort in learning is healthy and even necessary. There is no need to have an answer to every question. It is a collective learning process and the most important thing is that we respect and trust that we are in this to learn together. (10 minutes)

**Part 2: What does this have to do with the union or my leadership priorities?**  
30 minutes (Whole-group discussion)

13. In whole-group setting, facilitator to ask:

*I believe in equality; our union believes in equality. Why do we need to spend time on this? How is equity linked to the day-to-day priorities of our local?*

14. Possible themes that will emerge: necessity of having a “diverse community” to succeed in any campaign; decreasing union density makes union vulnerable to “divide and conquer” tactics of the right (or employers) who will use race as a wedge to divide workers; ethnic and racial demographics of the workplace (or community at large).

15. On chart paper, chart down the comments as they come – do not comment on them until the end.

After a few minutes, facilitator to point out points of convergence and divergence. It is best if participants themselves come to a consensus that *equity is a leadership task – if a leader fails in equity, she or he fails as a leader.*

16. Facilitator to hand out small slips of paper and pens to conduct informal survey (5 minutes). Ask participants to respond to the following statement on a scale of 1 to 10 (where 1 is complete disagreement and 10 is complete agreement):

*“Equity is essential to the survival, growth, and transformation of our union.”*

17. Each person will jot down their number on a small piece of paper (anonymously), fold the paper and hand it to facilitator. After all responses have been collected, facilitator to tally all the numbers on flipchart.

Note: Facilitator can comment on the cluster or range of responses, but there is no need for a prolonged interpretation or discussion. Survey serves only to give the group a rough idea of their collective position on this question. Facilitator can allow a few quick comments and move on.

18. Refer participants to the chart on page 3 of Equity Guide: Principled Approach versus Practical Approach to Equity.

19. Ask different individuals to read each line – preferably one person from one side of the room and another from the opposite side of the room. (5 minutes)

*Note to facilitator: This might be an ideal spot to take a 10 minute break. Ask everyone to respectful of time and really try to come back on time.*

### **Part 3: Diversity, Inclusion, and Equity**

30 minutes (Whole-group discussion)

20. Facilitator to draw out on chart paper 3 columns, each with a different heading – Diversity, Inclusion, Equity.

21. Facilitator to ask participants to read together the definitions of Diversity, Inclusion and Equity in the box on page 6 of EquityGuide. As participants read aloud, post the definitions of Diversity, Inclusion, and Equity from the box onto chart paper (can have these written out beforehand).

22. Draw out the distinction and relationship further with this dinner metaphor:

*Diversity is when you see “different groups” reflected around the dinner table. Inclusion is what you see on the dinner menu. Equity is about who gets served (and where they sit), the size of their plate, and who actually leaves feeling satisfied.*

It should be brought out in the discussion that the concepts of diversity, inclusion and equity are applied to other categories, not just race.

23. Facilitator to cut out scenarios from *Tool Kit: Is this a case of Diversity, Inclusion or Equity?* Distribute different pieces of paper to the group.

24. Ask them to post each piece under the appropriate column.

20% of a local’s membership is made up of women. 2% of the local executives are women. (Diversity)

The local has an active equity committee. (Inclusion)

Translation is available during bargaining updates to non-English speakers. (Inclusion)

In sending a delegation to the national convention, the local ensures that a member of colour (who reflects the membership) has a spot at the national convention. (Equity)  
50% of the union membership is people of colour. 80% of the stewards are people of colour. (Diversity)

Union local ensures that women, LGBTQ, and racialized members have developmental and leadership opportunities. (Equity)

Members are trained on anti-harassment, anti-racism policies and procedures. (Inclusion)  
Childcare is provided during membership meetings so that parents can participate in the union. (Inclusion)

Local union's bylaws require that the Executive Committee takes anti-racism and anti-oppression training course every two years, regardless of whether there has been a change in leadership or whether Exec members have taken it before. (Equity)

Local union has a membership of which 60% are made up by members of colour. All of the Executive members are white. Each year in February and May, the local asks one of its rank and file members to speak about Black History Month (or Asian Heritage in May) during its monthly membership meeting. (Diversity)

25. Now that participants have worked out the distinctions between these core concepts, review the pieces of paper under the headings to make sure they're in the right categories.

Ask and probe with the following questions:

*Is your leadership diverse?*

*Do you have inclusive practices? How?*

*What practices or programs promote equity within your union? Give examples.*

26. Summarize the discussion by referring everyone to read the longer definitions of Diversity, Inclusion, and Equity on page 6 and the box on page 15 of Equity Guide.

#### **Part 4: Snapshot of our union local**

20 minutes (Small group work)

27. Distribute short survey questionnaire to assess Inclusion and Equity
28. Ask participants to break into pairs or trios to answer the survey. Allow 10 minutes for group analysis. Facilitator to go from group to group to pull out key observations about the questionnaire.

29. After roughly 10 minutes, facilitator to bring the whole group back together and ask:  
*What did we learn from this exercise about our local union's practice of diversity, inclusion, and equity? Give examples.*

### **Part 5: A Framework to Analyze Systemic Barriers**

15 minutes (Whole-group discussion, small group work)

30. Facilitator to say that we're going to expand on the activity we did in Part 1 to understand more thoroughly how systemic racism operates in an organizational setting.
31. However, we need to first understand five main components that make an organization run effectively and how these can either be barriers or building blocks to equity. (10 minutes)
- Information** – who gets to communicate information, who is supposed to listen, who has access to this information and whose information is valued?
  - Connections / Networks** – what and whose contacts / networks are sought, valued, paid for, used to hire, promote, train, develop programs, and evaluate? What values and assumptions does the union hold about its connections with members of colour?
  - Experience and expertise** – what and whose expertise is sought, valued, paid for, and used? What values and assumptions does the union hold about the experience or expertise of members of colour?
  - Decision-making** – who gets to make the decisions in your local?
  - Are members of colour actively involved in decision-making? Are there consistent and pro-active means to involve their participation?
  - Resources** – who allocates time, energy, and money to what?
  - Who benefits from the allocation of resources and who influences the allocation?
32. Refer participants to page 18-20 of Equity Guide and ask the whole-group to do a shared-reading of the Assessment Questions beginning at the bottom of page 18.
33. Facilitator to synthesize and bridge to next activity. We have analyzed the 5 organizational components that can either be building blocks to equity or barriers to equity. What are our conclusions and recommendations for next steps and actions based on that?

## **Part 6: Strategies for Action and Next Steps in Building for Equity** 15 minutes (Whole-group discussion)

34. Facilitator to emphasize that equity work requires all of us to be deliberate and intentional. This is a leadership task. Read aloud the box on page 9 of Equity Guide – “Taking Action, Not Leave It to Chance.”
35. Facilitator to take participants through Table of Contents of Equity Guide. Point out the sections we accomplish today and the variety of other tools and resources available to them to continue to build equity in their unions. Walk them through some of the tools by taking them to the specific page.
36. Explain that the Equity Guide is a working document that will be revised and added to as this document and workshop gets rolled out across Canada.

After walking through Equity Guide together, ask:

*What is the first step for your union and who will lead?*

*What further assistance or support do you need to take the next step?*

## **Part 7: Evaluation** 10 minutes (Whole group discussion, individual)

36. Before distributing the evaluation form for participants to fill out, have everyone stand around to form a circle. Explain that they are only allowed to use one or two words (preferably an adjective) to express how they feel after today’s workshop.

Examples of adjectives: Energized, Hopeful, Drained, Overwhelmed, Challenged, etc.

37. Thank participants for their time and energies. Pass out evaluation forms.

This Equity Workshop was designed and developed by Jojo Geronimo, a veteran labour educator and human rights activist, and former Executive Director of the Labour Education Centre.

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