Best Practices for Race-Based Caucusing in the Workplace

Travis Andrews, Equity Director
Trisa Kern, Operations Director
WHO WE ARE

Mission
Columbia Legal Services advocates for laws that advance social, economic, and racial equity for people living in poverty.

Vision
A Washington State in which every person enjoys full human rights and economic opportunities.
BY THE NUMBERS

Statewide Staff
36 staff members across 5 locations

- Kennewick: 5%
- Olympia: 14%
- Wenatchee: 11%
- Seattle: 25%
- Yakima: 14%
- Leadership/Ops: 31%

Caucus Participation
Collective: 15 members | White Allies: 21 members

- Collective: 42%
- White Allies: 58%
ABOUT US

Travis Andrews
Equity Director

Trisa Kern
Operations Director
OUR JOURNEY

- Joint staff/mgmt committee
- Glossary of terms
- Implicit bias training
- Set organizational goals

IDM Initiative

Equity Survey
2012 STAFF SURVEY

Purpose:
• Identify internal dynamics, patterns, and trends
• Create a baseline for use in future evaluation
• Serve as a guide for new programming and policies

Recommendations:
• Promote fairness and equal opportunity
• Confront bias and discrimination internally and externally
• Prioritize leadership training and professional development
• Implement policies for hiring, retention, and promotion of diverse staff
• Define, develop and implement policies and strategies to address inclusion, diversity and multiculturalism in our advocacy
Inattention to Diversity

Figure 15: %, respondents who felt inattention to diversity interferes with selected issues

- Staff morale: 94%
- Staff retention: 75%
- Professional development: 59%
- Productivity: 57%
- Promotion: 52%
Professional Development
• Develop guidelines for attorneys, legal assistants, and paralegals
• Mentorship program

Leadership Development
• Develop guidelines to develop leadership skills

Program Culture
• Training
• Opportunities to connect
OUR JOURNEY

- 2013: White Fragility Training; Caucuses Formed (Oct.)
- 2014: Equity Director Role Created (Dec.)
- 2015: Collective Letter (May)
- 2016: Solutions Letter (Jan.)
- 2017: Group Solutions Presented to Staff
- 2018: Implementation + Ongoing Work
- 2019: Onward
<table>
<thead>
<tr>
<th>Issue</th>
<th>Proposed Solution</th>
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<tbody>
<tr>
<td>Office Culture</td>
<td>• Evaluate supervisors on CLS values and race equity</td>
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<td>• Mandatory equity training for leadership</td>
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<td></td>
<td>• Formalize the Collective</td>
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<td>Leadership Development Opportunities</td>
<td>• Formalize mentorship program</td>
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<td></td>
<td>• Leadership Development Guidelines</td>
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<td></td>
<td>• Professional Development Guidelines</td>
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<tr>
<td>Hiring Practices</td>
<td>• Establish a uniform hiring process</td>
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<td>• Transparency in hiring, selecting candidates, and equity considerations</td>
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<td>Problem Solving &amp; Addressing Concerns</td>
<td>• Institutionalize Equity Director role</td>
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<td>• Offer exit interviews, be thoughtful about who is conducting</td>
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<td></td>
<td>• Conflict resolution and restorative justice models</td>
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GETTING STARTED
WHAT IS AN AFFINITY GROUP?

Affinity groups, or caucuses are opportunities for those who share a common identity to meet separately to gather, connect, and learn.

Affinity groups based on racial identity allow time for people of color, white-identified people, and people with multi-racial identities to meet together to collectively engage in different work.

A tool for creating equitable organizational culture
RACIAL AFFINITY GROUPS

- Belongingness and Healing
- Build Community
- Connection and Support
- Build Relationships
- Collective Power
- Build Organizational Capacity and Resilience
- Employee Engagement
Define your goals:
• Connect caucusing to your
  • mission/vision
  • equity & inclusion strategy
  • HR strategies (recruitment, retention, leadership development)

Generate buy-in:
• Promote the idea and its value
• Share frameworks, language, and resources
• Make your case to leadership
GETTING STARTED

• Create shared
  • Language
  • Analysis
  • Framework

• Consider Logistics
  • Protect time and resources
  • Budget for meetings and resources

• Choose Facilitation
  • External facilitation can be helpful in the beginning
  • Build internal capacity

Be Flexible
• Needs change with time
GETTING STARTED

• **Create Ground Rules**
  - Shared expectations
  - Mechanisms for accountability

• **Commit and Invest**
  - Dedicate budget and time to further initiatives
  - Protect caucus spaces
  - Show up

• **Expect and Prepare for Resistance**
  - Provide resources
  - Participation is voluntary
OVERCOMING RESISTANCE

“If the point is unity, why divide us?”

“I don’t belong here.”

“It will create more problems than it will fix”

“Isn’t it usually a bad idea to let white people go off and organize themselves?”

“Can’t we just go and get coffee?”
WHY CAUCUS?

- Create a protected/brave space for POC to talk about & address experiences of racism and undo internalized oppression
- Retreat from the continuous “White Gaze”
- Build relationships and support through courageous and difficult conversations
- Create a power-base/ “counterspace” for POC within white spaces and become a body politic

Related models: Legislative Caucuses, Student Associations, Minority Bar Associations
CURRENT ACTIVITIES

- Shared experiences/similarities
- Organizing
- Internal Oppression
- Facilitation
- Group norms
- White Supremacy Culture
- Grace
- Self-Efficacy
- Transparency – Name the dynamics
• Complaint sessions
• Rulemaking and logistical traps
• Strict agenda
• Focus on work and policy
• Personality
• Responding to crisis
• Use of group to punish/personnel issues
WHITE ALLIES JOURNEY
WHY CAUCUS?

White People

• Work through barriers that prevent white people from allying together toward anti-racist goals
• Hold each other accountable for actions and behaviors
• Build relationships and deepen understanding of power/privilege
• Build collective tools for anti-racism work
• Discuss growth & learning edges without causing harm to and burdening POC

• Related models: Anti-Racist White Groups
  European Dissent, Showing up for Racial Justice
CURRENT ACTIVITIES

- Shared purpose
  - What are we here to do?
- Detour spotting
- Transforming White Privilege
- Process Collective letter
- White guilt—coping and resiliency
- Debiassing
- Microaggressions
- Calling-In Strategies
  - Carefronting v. confronting
- Addressing individual privilege and racism
- Naming and addressing dynamics
WHITE SUPREMACY CULTURE

• Perfectionism
• Defensiveness
• Quantity over quality
• Sense of urgency
• Individualism
• Worship of the written word
• Paternalism
• Progress is bigger, more
• Either/Or thinking
• Power hoarding
• Right to comfort
• Fear of open conflict

“A set of dominant cultural assumptions about what is good, normal or appropriate that reflects Western European white world views and dismisses or demonizes other world views.”

Cultural White Privilege, Racial Equity Tools

What characteristics have you seen play out in your organization?
PITFALLS

- Lack of shared understanding
- White guilt
- Distancing
- Rulemaking, administrative discussions, detours
- Negativity, complaining
- Demand for action vs. process
Define YOUR Organizational Culture:

Culture: A set of spoken and unspoken shared norms, beliefs, values, expectations and assumptions held by most members of an organization and amplified by behaviors of leaders

Set & Align Organizational Culture

Make Implicit Expectations Explicit
WHAT IS YOUR ROLE?

- Center equity and transparency around decisionmaking
- Communicate clear process and procedure
  - Caucusing is not the place for filing complaints
  - When managers have an obligation to report
- Protect the organization and manage risk—don’t get sued!
- Be intentional about developing leaders of color
- Retain excellent staff
- Use caucusing as a recruitment strategy
Anti-Discrimination & Anti-Harassment
• Related to *perceived* protected status
• Flags inappropriate behavior
• Intention is irrelevant (harassment can be unintentional)
• Gives examples
• Applies to community partners, co-counsel, and others acting with CLS
• Emphasizes a mutual responsibility to prevent and address harassment

Other Features:
• Clarifies obligation to report and confidentiality expectations
• Clarifies investigation process and grievance process
• Clarifies reasonable accommodation process
## CONFLICT RESOLUTION TOOLS

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<tr>
<th>Policy</th>
<th>Restorative Justice Conflict Resolution</th>
<th>Grievance</th>
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<tbody>
<tr>
<td>Purpose:</td>
<td>Restore connections between people, mutual learning, and correcting harmful or inappropriate behavior.</td>
<td>Investigate and address/correct breaches of policy and collective bargaining agreement.</td>
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<tr>
<td>Use When:</td>
<td>People are in conflict with each other and would like to engage in a less formal/official process to end the conflict.</td>
<td>An individual seeks a formal resolution with specific outcomes.</td>
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<tr>
<td>Process:</td>
<td>People in conflict have three options: 1) Coaching to have difficult conversations or address conflict 2) Request mediation style coaching with parties 3) Restorative circles are available for broader impact that affects more than conflicting parties</td>
<td>Issue is reported and an investigation is conducted. Findings are communicated to affected parties and remedies are created based on the findings. Appeals process exists.</td>
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WHAT DOES IT TAKE?
KEYS TO ENGAGEMENT

Vulnerability
• Willing to be challenged and/or relinquish comfort
• Comfort in discomfort creates connection

Accountability
• Willing to be humble
• Own impact and intent
• Calling in/out

Consistency
• Keep showing up
• Committed and Intentional
• Dependable

Trust
• Open and invested in the collective
  • Establish and build upon relationships

Transparency
• Overcommunicate process

Equity
• Encourage open discussion—all ideas are treated with respect
• Step up, step up

Responsiveness
• Be diligent and responsive to concerns and complaints
DISCUSSION

What do you need to caucus by race at your organization?
RESOURCES

https://www.racialequitytools.org/act/strategies/caucus-affinity-groups


http://paulkivel.com/resource/separtism/

https://www.compasspoint.org/blog/race-caucusing-organizational-context-poc%E2%80%99s-experience


REJI Organizational Race Equity Toolkit

View & Download at: justleadwa.org/learn/rejitoolkit

- Includes the REJI Organizational Assessment focusing on
  - Securing an Organizational Commitment
  - Creating More Equitable Organizational Culture
  - Recruitment, Hiring, & Retaining a Diverse Workforce
  - Developing Accountability To and Partnerships with Communities of Color
  - Applying an Anti-Racism Lens to Programs, Advocacy & Decision-Making
Trust the Process: Reflections of a Nonprofit Race Equity Movement


Reflections on the initial race equity work at Columbia Legal Services by the then-Equity Director Dr. Michelle Majors
CONTACT US

TRAVIS ANDREWS, Equity Director
Travis.Andrews@columbialegal.org

TRISA KERN, Operations Director
Trisa.Kern@columbialegal.org