



THE #CAMPAIGNEQUITY HANDBOOK

**HOW TO BUILD AN IDEAL CAMPAIGN WORKPLACE
SO YOU CAN WIN WITH INTEGRITY.**

**WORKING
IDEAL**

WWW.WORKINGIDEAL.COM



#CAMPAIGN EQUITY

HOW TO BUILD AN IDEAL CAMPAIGN WORKPLACE SO YOU CAN WIN WITH INTEGRITY

As a campaign professional, you might already understand the benefits that building a campaign work culture based on equity can bring to your operation. Or perhaps you're responding to actions in your community and around the nation challenging police brutality and structural racism, or in support of the #MeToo movement, or resisting current Administration policies hostile to immigration and LGBTQ people. Regardless of why, we're glad that you've decided to consult this guide as a resource. We have pulled together our experience working on and consulting with political campaigns, and our deep understanding of practices for creating safe and inclusive workplaces, to help you win -- with integrity. We have also supplemented these recommendations with special considerations for operating during the COVID-19 crisis. We aim for the information here to be concrete, practical, and realistic, and applicable to campaigns of any size. We want the guidance to be dynamic and always informed by recent experiences. In other words, we welcome your feedback.

WHO COULD BENEFIT FROM THIS HANDBOOK?

This resource was developed with political and issue campaigns in mind, and with some materials targeted specifically for the campaign environment. However, this handbook could prove helpful in a variety of contexts-- especially fast-paced and dynamic organizations that are tied to a progressive mission. It is also a resource for winning candidates making the transition to staffing their offices.

WHY PRIORITIZE EQUITY AND INCLUSION?

Your commitment to campaign equity is **how you win**. You may feel like you don't have the resources to foster a robust commitment to campaign equity. The truth, though, is

that you can't afford to leave these critical issues unaddressed. Dedicating resources to campaign equity will pay dividends in a multitude of ways. Having a workplace culture that lifts up Black Lives will help staff feel supported and seen at work, which is especially important for staff experiencing trauma from witnessing or experiencing police violence and societal oppression. It will also help your campaign connect with important constituencies, and make your campaign's work environment consistent with your candidate's message about equality. Finally, building an equitable workplace culture will empower staff to hold you accountable to these commitments.

WHEN IS THE RIGHT TIME?

The closer your campaign gets to election day, the less and less bandwidth you'll have to devote to these issues. Make a commitment as early as you can, start building the infrastructure and systems, and lock them into the daily culture of your campaign. That means you get the benefits from day one, and reduces the risk that these issues will create a crisis that derails your plans. But it's never too late to apply campaign equity principles to your work. Like so many things, dedicating a modest amount of regular attention to campaign equity from the start is far better than scrambling to fix a problem later -- but worst of all is spending a grueling news cycle roiled in it. Campaigns are temporary, but the staff experience you build can permanently shape the career and reputation of both you and your candidate.

HERE IS THE GOOD NEWS.

First-- campaigns of any size and budget can use equity principles to build a fair and inclusive campaign workplace culture. Second—even if you don't have a background in Human Resources or Equal Employment Opportunity, you may already know a lot about how to build equity and inclusion in your campaign workplace. Many of the concepts and strategies you deploy in campaign work can apply to the campaign workplace. You are not starting from square one. Here are a few examples that should give you some confidence:

- ▶ Use what you know about electoral engagement to guide a **plan for staff engagement**. Your candidate's constituent engagement builds connections and translates into enthusiasm, loyalty, and votes. The engagement strategies that drive voters to the polls can be harnessed to motivate staff to perform at the highest level and carry your candidate to victory.
- ▶ As with targeted canvassing, paid media, GOTV, and other aspects of campaigning, **data is your friend**. Building systems to collect data, and then analyzing that data to make strategic decisions, can give you an edge. The

same applies in effective campaign equity management. Tracking your hires, promotions, departures, and complaints will help you identify challenges or bottlenecks early, and processes that are working. But as with all data and technology, consider it a supplement to conscientious management, rather than a substitute for it.

- ▶ You need a clear strategy that lays out a concrete, identifiable path to electoral victory, and similarly you should use **strategic planning tools** to cultivate the IDEAL campaign workplace. Working backward, and mapping out the constituencies needed to win, will guide the strategies you develop to get you there. Similarly, identify aspirational but realistic goals to work toward from day one. You may need to adapt your strategies as things change, but your goals should stay the same.
- ▶ Like with campaigning, **apply evidence-based strategies** that work to build a better model. The conventional wisdom is sometimes proven wrong, and through research and experience we find better ways of doing things. Don't be afraid to adapt and change as you learn more about your workforce and more about workplace equity research, such as the resources highlighted in the reading list and the endnotes in this document.



WE'RE HERE TO HELP YOU WIN WITH INTEGRITY.

This handbook gives you strategic tools and a set of checklists structured around achieving seven essential #CampaignEquity goals. We think that these goals represent a good framework for building a campaign workplace focused on equity and inclusion. They promote efficiency and deliver effective results. And they are grounded in the values that brought you to this work in the first place.

- 
- ▶ **Day One.** Our campaign will be intentional and consistent about campaign equity from day one.
 - ▶ **Harassment-Free.** Our campaign will take a serious approach to eliminating all forms of harassment.
 - ▶ **Great Hires.** Our campaign will attract the highest caliber staff by recruiting based on skills and experience, and by building a team that represents a diverse cross-section of our constituents.
 - ▶ **Pay Equity.** Our campaign will pay all staff based on objective factors and principles of equity.
 - ▶ **Lead by Example.** Our campaign leadership will model respectful behavior, and our staff will have the training and support they need to report, address, and resolve workplace problems.
 - ▶ **Safe & Inclusive Culture.** All members of our team will feel safe and welcome within the campaign and supported in their work in our community.
 - ▶ **Values in Practice.** Our campaign is committed to implementing workplace policies that our candidate supports on the campaign trail.

Not every piece of advice will work for every campaign, but these are achievable and effective for most campaigns.

This handbook also provides context and prompts to get in the right frame of mind to start planning your strategy, along with examples of problematic situations you'll help avoid by being proactive and responsive in addressing campaign equity. Together, these tools can be used today to start building and fostering an equitable and inclusive work environment on your campaign.



#DAYONE

OUR CAMPAIGN WILL BE INTENTIONAL AND CONSISTENT ABOUT CAMPAIGN EQUITY FROM DAY ONE.

THE ADVANTAGE:

You won't waste valuable time throughout the campaign, especially at critical junctures, addressing equity issues, shortcomings, or missed opportunities that could have been addressed earlier.

THE CONTEXT:

Start with the assumption that your campaign is going to grow and succeed: **make your commitment to campaign equity on day one.** This will give yourself adequate time to thoughtfully design and implement the policies and infrastructure that you will need at all stages of the campaign – from staffing up to winding down – including hiring, onboarding, training, and managing a dispersed staff. You don't want to be caught flat-footed by an unanticipated change in circumstance.

Implementing adequate communications, oversight, and reporting structures will provide you with the information you need to spot problems early, when they are easier to resolve. Making and implementing these commitments from the beginning will spare you and senior leadership from having to make decisions about people and culture under intense pressure and potential scrutiny, and reduce the chance that you'll be forced to spend outsized money and resources to resolve a crisis.

THE SIDESTEPED SCENARIO:

You are directing a campaign in the midst of a 3-way primary. You put a lot of time into carefully selecting your first round of hires, ensuring a representative distribution of managers that represent your candidate's constituents. You're

pleased with your hire of an operations director who is competent and ambitious, though she lacks extensive experience with HR or EEO. One of your opponents has an emergency that causes her to drop out, and you suddenly have a new opportunity to pick up supporters of the withdrawn candidate. You ask your Ops Director to add to the constituency outreach team. Meanwhile, you are focused on preparing for the upcoming debate. In a rush, your Ops director reaches out to the withdrawn candidate's team and offers positions to three members of their staff. She slots them into positions that align with their seniority levels and to fill gaps in your existing structure, and you do not carefully review the new configuration. On the eve of the debate, you realize that the new arrangement has resulted in the managers of all of your constituency outreach groups being men. You know there's a chance that these issues may come up at the debate, or in the post-debate presser. In a panic, you spend the night before the debate re-arranging the staff roster and moving people around for a more equitable arrangement, and don't spend any time supervising your candidate's debate prep. You have to cross your fingers and hope that your debate prep team was up to the task.



#DAYONE STRATEGY CHECKLIST

MAKE THE UPFRONT COMMITMENT

- ✓ When making your staffing plan, **consider a Chief Equity Officer** who heads a department that has genuine authority and reports to top leadership. Build ways to ensure top leadership always models campaign equity commitments.

PLANNING AHEAD

- ✓ When making your staffing plan, include hires with EEO or equity experience or training, whether you locate them in Operations or create a dedicated campaign equity department. Remember that **HR experience with payroll and benefits administration may not necessarily translate into the ability to manage EEO compliance and equity implementation.**
- ✓ Evaluate the management experience and capacity of your hires across departments. Develop a plan to train all managers in equity principles.
- ✓ Align your HR and staffing plan with key dates on the campaign timeline. Anticipate growth and wind-down. Ensure you have a staffing plan that accounts for needs and future growth at each phase.
- ✓ **Develop specific approaches to recruitment, hiring, onboarding, compensation, training, supervision, advancement/promotions, safety, reporting, and discipline** -- make them scalable to adapt to different phases. For example, when you draft interview questions and an onboarding deck at the beginning, they are ready to deploy throughout the campaign. Have a wind-down and closure plan.

SMALL CAMPAIGN TIP

In lieu of a Chief Equity Officer, establish formal accountability for campaign equity, such as a designated staff person to serve as your equity specialist -- with the relevant background, training, experience, and skill set.

#DAYONE STRATEGY CHECKLIST

- ✓ Evaluate your organizational communication of policies and procedures. If feasible, integrate equity processes into the existing framework to increase efficiency. **Policies and procedures should be in writing and easily accessible.** Follow your procedures -- deviations from procedures should be discouraged, and any deviations should be justified in writing to the COO/ equivalent.
- ✓ Review your reporting and decision-making channels. Do they provide consistency and accountability that will withstand the fast-paced environment in which they will operate? What are the processes for communication between HQ and regional/local offices? Should EEO concerns have separate or integrated channels? This may depend on the size of your campaign.

ACCESSIBILITY TIP:

People learn in different ways and need to hear information more than once. Consider sharing policies and procedures in written form, and uploading them to an easily accessible site or shared drive with staff. Announce the policies or changes to existing policies during staff meetings or huddles and send a written copy to the document with a link on where to find it online. If presenting new information during the meeting, make sure you ask for questions at the next meeting, when people have had time to read and process the information you shared previously.

TECHNOLOGY

- ✓ Consider enhancing existing data management tools to also track hiring, compensation, and attrition by demographic categories. Consider tracking and monitoring personnel decisions and outcomes. Ensure your technology is a supplement, not substitute, for good management.


CONTEXT CONSIDERATIONS - COVID-19:

Empathy will play an especially important role during the COVID-19 crisis, because individuals are having a vast range of different experiences as a result of the crisis. Some people are able to largely maintain their day-to-day lives with only minor adjustments, while others are experiencing the most significant personal crisis of their lifetimes. A person's experience may depend on a variety of factors. Importantly, existing disabilities or physical or mental health conditions are shaping some peoples' experiences. In addition, location relative to virus hot spots and economic conditions in their community play a role. Finally, access to family and friends or a community of support, or having responsibility to care for family members or friends who may be unemployed, work in stressful front line occupations, or who are elderly or otherwise vulnerable to infection, are among a long list of factors that are in play. Take every opportunity to remind all staff and volunteers that they should be empathetic toward coworkers' situations, and to not assume that they know the full extent of others' challenges. Be mindful of the general mental health strains imposed by the pandemic.¹

Think through what your commitment level to COVID-19 safety is going to be throughout the campaign, and what standards you are going to use to gauge your operations decisions. You might want to adopt, for example, a policy of following the state-level restrictions that are the most stringent among the states in which you have team members. Make a list of all the ways in which COVID-19 may affect your operations — from harassment reporting channels, to recruitment strategies, to its impact on your campaign's pledged values. Maximize transparency and make your commitment to COVID-19 safety readily available to potential job applicants or volunteers via your website and social media to reassure the best candidates that you are taking their safety seriously.

Decide upfront what flexibilities you are prepared to





provide to accommodate the caregiving responsibilities of candidates, staff, and volunteers, and remember that in an unprecedented and rapidly changing environment, sticking to standard practices will not create more comfort or stability. Bring your creativity and innovation.

When hiring, keep in mind that some of your best candidates may not feel comfortable sharing upfront what their competing caregiving responsibilities or health concerns may be. For those who are used to being star performers, and always getting things done well, their current circumstances are testing their confidence. Try to provide as much transparency about what your policies are going to be, to make it easier for candidates to decide if it will be workable for them.

It's a mistake to write off candidates who have caregiving responsibilities due to COVID-19, or who may have COVID-19 health-related concerns (pre-existing conditions, immuno-compromised, or other factors). It is a short-sighted strategy that won't give you the strongest team in the long run. It's a better practice to build a workplace that is inclusive for everyone, including staff with disabilities, by working to accommodate the COVID-19-related needs of all workers.



#HarassmentFree

OUR CAMPAIGN WILL TAKE A SERIOUS APPROACH TO ELIMINATING ALL FORMS OF HARASSMENT.

THE ADVANTAGE:

Workers perform their jobs better and can focus on the campaign mission when they are working in a safe and harassment-free workplace. They are also more likely to stay the course through the campaign and continue in campaign careers. Harassment harms individuals,² undermines productivity,³ and can violate trust in the campaign and trigger negative public attention.⁴

THE CONTEXT:

You have the power to take harassment prevention seriously. It's true that you cannot personally police every comment or action among a large, dispersed staff, but you can **communicate that your campaign is committed to preventing, identifying, and combating harassment, and follow through with the actions to back that up.** Research suggests that clear and consistent anti-harassment messaging from leadership is critical.⁵

The EEOC's report on harassment⁶ identified work environment **risk factors**, and you will (unfortunately) be going up against most of them: workplaces that are **historically non-diverse, younger staff, "high value" staff** (those seen as indispensable), **power disparities, isolated and decentralized work, and alcohol consumption.** Although the slate of risk factors is intimidating, it provides a good starting point for prevention. Even in typical workplaces, victims of harassment are more likely to downplay or avoid harassment than to report it.⁷

Effective policies and practices increase your chances of learning about harassment. Formal structures and procedures that provide appropriate and



CAMPAIGN RISK FACTORS

(adapted from EEOC Report)

- ▶ Historically non-diverse workplace
- ▶ Presence of high-value employees
- ▶ Presence of younger employees
- ▶ Power disparities among employees
- ▶ Decentralized and isolated work
- ▶ Alcohol

timely responses to address misconduct and prevent retaliation can empower workers to come forward and raise concerns before even more serious problems develop. Research has established a connection between workers' perceptions of an organization's response to harassment and future harassment prevention, and perceived organizational tolerance may be harassment's strongest predictive factor.⁸

Two factors make campaigns especially risky: (1) their temporary nature, and (2) the power imbalances created by high-value employees. Because campaigns have a short time horizon, candidates and campaign managers may fail to invest in harassment prevention upfront, AND may tend to just try to "ride out" any harassment problems that do arise. It becomes even more tempting to "ride out" problems when the person accused is someone that the campaign would have trouble replacing. **Do not make the mistake of downplaying a person's problematic behavior because they are "invaluable" to the campaign. Ignoring problems may invite escalation, create legal liability, and depress worker morale and trust.**

A SIDESTEPPED SCENARIO:

You went to great lengths to scope out the wittiest, wokest, and most-wanted social media director for your campaign. Your candidate clearly benefits from the clear, identifiable narrative voice in his Tweets and Facebook posts, directed and overseen by the social media director. You can see the difference in the social media engagement between your candidate and her opponent. You couldn't be happier with your social media director's work. However, after about a month on the job, you learn that your social media director has created a deeply toxic culture in the communications department. He blatantly plays favorites among staff, and casually dismisses input from people of color and their concerns about certain messaging. He pressures the department staff to go out together to get drinks, but frequently becomes intoxicated and, at times, engages in unprofessional behavior, flirting with some direct reports, and directing microaggressions at staff of color. You also know that several members of his team, both men and women, have shared that they look up to him and see him as a mentor and positive influence. It's clear from the reported conduct that the situation is serious, and may be creating both an undesirable work culture, and a legal liability. You make the decision to terminate the social media director, but many of your senior leaders question whether anyone will be able to fill the role, especially since none of the junior staff on the team were ever included in developing the tweets and posts, and didn't receive adequate training. You know it's the right thing to do, but regret not having a structure in place to ensure that the deputy was prepared to step up and fill the role.



#HARASSMENTFREE STRATEGY CHECKLIST

POLICIES AND PROCEDURES

- ✓ Establish **clear policies addressing all types of harassment** for staff and volunteer work space, events, and travel, and ensure they apply to the candidate, campaign leadership, supervisors, staff, volunteers, surrogates and anyone who may be in a campaign's orbit (think vendors, delegates, event space staff, security personnel, party leaders/officials, media, and the candidate's "kitchen cabinet").
- ✓ Be specific about your campaign's policy addressing dating and consensual sexual relationships for all staff, but particularly between individuals in a reporting relationship.
- ✓ Make clear you will **protect confidentiality for the individual who comes forward to the extent possible**. Confidential and sensitive information should be shared on a need-to-know basis. Policies that fail to sufficiently protect privacy could dissuade an individual from coming forward because sensitive information would be disclosed. Your policy should explicitly address when and how information is shared.
- ✓ **Consider collecting staff input when developing or improving policies and procedures**. For example, a simple, staff-developed alert system¹⁰ has been deployed effectively in a restaurant setting, and may serve as a possible model for field staff to request supervisor interventions with problematic volunteers. Seeking input from staff results in relevant, user-friendly policies, and increases worker engagement and trust in the policies, and of management commitment. Keep in mind that requests for feedback can sometimes be intimidating, and providing anonymous channels through surveys or online platforms can be helpful.
- ✓ Implement **reporting processes with multiple avenues**¹¹ that can protect the privacy of a complainant, and shield them from retaliation.
 - ▶ Your policy should identify individuals designated to receive reports, and clarify that the typical "chain of command" may not be relevant in reporting harassment or discrimination, so they can go directly to the designated officials.

#HARASSMENTFREE STRATEGY CHECKLIST

- ▶ Clearly communicate who should receive notice within the campaign. Provide for, and explain, both formal channels (that constitute a formal complaint and trigger an investigation) and informal channels (that may be more preliminary or exploratory in nature).
- ▶ Provide contact information for relevant third party resources for incidents of sexual assault (local police, hospitals) and discrimination (EEOC or local/state human rights agency).

✓ Backstop leaders and **ensure that no position is indispensable**. Train deputies to step into director roles, or share responsibility among team leadership. If a position becomes indispensable, it creates a risk that the appropriate management decision to terminate or otherwise discipline that person for harassment might be avoided because of their value and contributions to the campaign.

✓ Consider how to inform non-staff campaign affiliates (volunteers, event guests, surrogates, etc) of the campaign's expectations regarding professional behavior and harassment, and how to report any concerns.

RESPONSES

✓ Make a plan for **prompt, visible, and responsive action to harassing conduct**, including specific provisions to prevent retaliation. Workers' perception of an organization's response to harassment is critically important to maintaining confidence in the system, and directly linked to preventing harassment. Evaluate whether a proposed solution – such as a transfer – may actually penalize the person reporting the harassment, or may simply subject other people to the offending behavior.

✓ Respond to harassment complaints with **calibrated discipline**. Avoid “**zero tolerance**” language. There is evidence that some victims avoid reporting because they don't want to feel responsible for the consequences, especially if the harasser is terminated.¹² To help mitigate this risk, consider a policy that specifically conveys that disciplinary action will be proportional—i.e. non-egregious first offenses will result in a warning or penalty, while egregious or second/multiple offenses will result in termination. **Follow up with those**

#HARASSMENTFREE STRATEGY CHECKLIST

reporting harassment to share updates on the steps that have been taken¹³ and ensure the problem is resolved.

- ✓ **Specify what supervisors are required to do** if they receive a complaint or witness inappropriate behavior, including harassment. Provide adequate support and training so they know how to best respond to harassment, and how to avoid and prevent retaliation against anyone who makes a complaint. Retaliation can take the form of changes in work assignments and opportunities, discouraging future reporting, or expressing concerns about future employment opportunities.
- ✓ Consider the use of ombuds¹⁴ and third-party reporting options if resources allow. Investigations should be conducted by trained, neutral parties who are experienced in protecting complainants from retaliation. This memo¹⁵ is a good resource.

SMALL CAMPAIGN TIP

In addition to encouraging staff to raise concerns directly with the campaign manager, designate a trained individual like an operations coordinator to receive complaints if a dedicated staff member or third party isn't an option.

HARASSMENT AND RACIAL AND GENDER JUSTICE:

Preventing workplace harassment is a key element when it comes to hiring and retaining diverse talent and ensuring that diverse communities have meaningful access to politics as a profession. The Leaky Tech Pipeline Framework, pioneered by the Kapor Center for Social Impact, describes the tech industry pipeline not as one that is empty, but one that starts out full but leaks along the way, starting in elementary school.¹⁶ In addition to robust education efforts and recruitment, one key leak is the treatment of people of color once they enter the industry - whether they experience harassment and discrimination can determine whether they remain in the field or leave. There is comparable research about how workplace harassment impacts women and women of color in STEM fields.¹⁷ Similarly, even if progressive campaigns are successfully recruiting people of color and women at the entry level, these fields are not fully accessible until the workplace is free of harassment and discrimination.

CONTEXT CONSIDERATIONS — COVID-19:

Reporting harassment can be difficult under any circumstance, and the circumstances arising from COVID-19 may make reporting harassment even more challenging. It is easier for victims of harassment to report to managers that they know and trust, and building that trust over virtual channels may be more difficult, especially for recently-onboarded staff. Managers should make efforts to encourage interactions via virtual channels that build connections with staff.

Be aware of the ways in which COVID-19 implications on harassment prevention may cut in multiple directions. The crisis will go through multiple, perhaps non-linear, phases, and your awareness and response needs to adjust accordingly. On the one hand, there are fewer in-person interactions during which harassing behavior may occur, but on the other hand, the lack of a central, physical work location may create a sense of lowered behavioral accountability. During a remote-only phase, be particularly cognizant of the ways inappropriate behavior may occur via virtual channels, including email, Slack, chat and text. Make sure your reporting channels are accessible to remote staff and consider more regular reminders to all staff about respectful conduct and options to raise concerns. As the workforce transitions back to some in-person interaction, it may lead to isolated physical locations with modest staffing levels, which can increase harassment risk. Ensure your harassment response systems are tailored for each of these phases.



#GreatHires

WE WILL ATTRACT THE HIGHEST CALIBER STAFF BY RECRUITING BASED ON SKILLS AND EXPERIENCE, AND BY OFFERING A WORKPLACE THAT REPRESENTS A DIVERSE CROSS-SECTION OF CONSTITUENTS.

THE ADVANTAGE:

Finding, hiring, and promoting a diverse staff across departments directly benefits your campaign success through better strategic decision-making, increased innovation, and improving your campaign's ability to connect with communities of supporters.

THE CONTEXT:

Talent and ambition transcend area codes and alma maters. Relying on existing networks, or focusing on elite schools, may seem like a cheap and easy way to recruit, but you risk replicating an outdated model of “the ideal” campaign staffer, and actually limit your ability to attract top performers.¹⁸ In fact, using elite universities as a screening tool may essentially act as a screen based on family wealth (standardized test scores are highly correlated to family wealth).¹⁹ It may help to step back and think about the type of upbringing and background that might cultivate the attributes that make an exceptional field organizer: resourceful, innovative, determined, good judgment, ability to empathize with a range of voters. **Look for ways to seek out a mix of talented staff with relevant backgrounds inside and outside of campaigns** — this combination is more likely to generate sound yet innovative ideas. For senior hires, consider using a diverse hiring committee — accountability to a diverse hiring committee has been shown to lead to increased hiring and promotion of diverse candidates.²⁰ This applies across departments — communications, data and tech, field, engagement, policy, and finance. Diversity in both leadership and staff will give you an edge through better strategic decision making²¹ and connecting more authentically with constituency groups.

While your efforts to diversify staff ranks may focus on hiring in the constituent outreach department, you should **make sure that you are applying a DEI lens to all your hiring and all positions**. And when bringing on new staff of color or from any group that is underrepresented in your organization, be mindful of ensuring they are fully empowered and included.

And finally, make sure you are able to really benefit from the broad experience and perspectives of your team. For example, outreach or constituency programs that lack power, resources, or real influence may lead constituent communities to mistrust the candidate and campaign. **If you don't back up your campaign equity programs and initiatives by real commitment**, you risk making your campaign look opportunistic and untrustworthy, both internally and publicly. It engenders distrust if your campaign has the budget to make these hires, and the public later concludes that these staff are just window-dressing whose views are dismissed and minimized at the decision-making table. And failing to value your team's strategic perspective may cause you to lose the key voters you need. These harms could be reinforced if constituency outreach is the only place where you have people of color on staff, rather than also having diverse leadership and policymaking staff. In fact, having diverse leadership may positively impact the way other diverse groups are hired.²²

A SIDESTEPED SCENARIO:

Your candidate has come out strongly against the federal family separations border policy and changes to federal immigration enforcement such as DACA. Your media team has spent a lot of time on a compelling social media campaign highlighting your candidate's work on these issues. Your outreach team advises a listening roundtable to hear from constituents who have concerns about immigration and who may be directly affected, and your candidate enthusiastically agrees. When you and the candidate arrive at the roundtable, you realize that the event is located in a municipal building that requires ID to enter. Ultimately, the forum goes without a hitch, but some attendees were deterred due to the ID requirements. Meanwhile, your opponent held a well-attended forum at a local community center serving immigrants, and made a much stronger connection with the target community. You reflect on the decision-making that went into your event and realize that your campaign had failed to assign this event either a staffer with relevant immigration policy and organizing experience, or a staffer with relevant personal experience (for example, a DACA recipient or organizer), who would have immediately flagged the ID requirement as problematic. You conclude that you need to make adjustments to staffing and event-planning procedures to better reflect your campaign's commitment to immigrant communities.

#GREATHIRES STRATEGY CHECKLIST

RECRUITMENT PLAN

- ✓ Design a recruitment plan for use at each phase of hiring. Consider expanding your network and applicant pool by recruiting through community colleges, HBCUs, and other educational institutions with diverse student populations. Seek to connect with student leaders who may have organizing experience with underrepresented communities. Make a list of communities to reach, such as social justice advocates, student groups, retiree organizations, labor groups, and faith communities, and cultivate meaningful channels to connect with them.
- ✓ Thoughtfully adopt hiring criteria. Write job descriptions for each department or area that identify concrete skills and criteria. Review these criteria for possible barriers (check out EEOC's advice on barrier analysis linked in this footnote²³) and make adjustments. Broaden the definition of qualified candidates by incorporating the value that people of diverse backgrounds bring to the campaign, such as new perspectives and contacts within communities, and relevant non-campaign experience. Consider using language in your job descriptions about skills and competencies and focus on what is needed to do the job, rather than credentials.²⁴ Asking only about specific prior experience can deter candidates without previous campaign experience from applying, even when they bring unique talents and perspectives that could be beneficial to your team. Actively debias your processes by using readily available toolkits and checklists.²⁵

EVALUATING CANDIDATES

- ✓ Establish objective hiring and evaluation criteria, and put procedures in place to ensure they're followed. Research suggests that more structure (like listing positives and negatives) decreases bias in evaluating candidates.²⁶ People tend to "prefer" those similar to themselves, which can perpetuate historic demographic patterns of an industry. Deviating from set procedures can allow bias to creep into the process – any deviations should be submitted in writing for approval to the COO/equivalent and tracked.
- ✓ Especially for leadership roles, consider the use of a "diverse slate policy," such as one modeled on the Rankin-Chisholm rule.²⁷ Research suggests that interviewing at least one woman or person of color does not result in more diverse hiring outcomes, but interviewing at least two does.²⁸ If the status

#GREATHIRES STRATEGY CHECKLIST

quo has been hiring white men for leadership or tech roles (or young college graduates for all the organizer positions, or women for administrative or HR positions), then it's easy to default to assuming they are the most qualified. If only one candidate who doesn't match the status quo ends up in an interview pool, employers tend to favor the default candidate, often a white man. But when multiple candidates who bring diverse perspectives enter the field, the status quo can shift, and the playing field starts to level out.

- ✓ Carefully review your background vetting procedures for legal compliance and for possible barriers. Background checks should be nondiscriminatory and consistent with EEOC guidance and state/local "ban the box" requirements. Note your candidate's positions on drug decriminalization/legalization and criminal justice reform: if your candidate supports the decriminalization of low-level drug offenses, be mindful of how you treat such offenses in your hiring process, or in any drug-testing policy. Train managers and hiring officials how to address Title VII compliance, as well as how to evaluate factors like allegations of harassment or racial bias in past positions that would not come up in a criminal background check.

MANAGE DIVERSITY

- ✓ Be intentional about representation from day one – monitor and track hires across seniority levels and departments. Incentivize and recognize team leaders who are successful in recruiting and managing diverse teams. Research suggests that using diversity accountability structures for management can strengthen related efforts like diversity training and mentoring.²⁹
- ✓ Before and after each major phase of hiring, examine your hiring outcomes to evaluate whether changes are needed. Measure and report out your results at regular intervals.
- ✓ Ensure that your recruitment and hiring plan is part of a broader holistic plan for inclusion and equity. Simply hiring people of color does not, in and of itself, address an organization's DEI goals and concerns. Once people of color are hired, there must be mechanisms in place to ensure that they are treated equitably, are not tokenized, and are not unfairly burdened with DEI responsibilities that would not otherwise fall to them.

CONTEXT CONSIDERATIONS — COVID-19:

Early anecdotal evidence suggests that women may be shouldering a disproportionate share of caregiving or other home responsibilities created by the COVID-19 response.³¹ And women of color, who frequently shoulder a primary caregiver role in their families, may have compounding experiences as a result of the pandemic.³² This phenomenon may affect who is applying for jobs or promotions during different COVID-19 response periods. If you want to recruit and promote the best candidates for your campaign, remain mindful of candidates that may need particular outreach and reassurance regarding the campaign's commitment to respect the concurrent demands of caregiving and work responsibility.

SMALL CAMPAIGN TIP

Look for low-cost strategies that pay off – there is evidence that hiring and promoting women can help reduce harassment.³⁰

CONTEXT CONSIDERATIONS — TRANSITION:

When the campaign is over, conduct a retrospective survey and evaluation of key managers and staff. Note who had strengths in managing diverse teams, and make that information available to whomever is hiring for the candidate's new office. There should not be an automatic conduit from the campaign to the new office – if there were complaints regarding problematic behaviors, those must be evaluated and addressed. The offices of public officials are just as high-pressured and fast-paced as any campaign environment and you need a team that can carry out their work with integrity and professionalism.

SAMPLE DIVERSE INTERVIEW SLATE POLICY

Based on the Rankin-Chisholm Rule

For any open position at [xxx] level or above, the [campaign manager / state director / other decision-maker] will conduct an in-person or video interview with a slate of at least [###] candidates from diverse perspectives and backgrounds on the basis of gender, race and other factors, including multiple women and people of color.



#PayEquity

OUR STAFF WILL BE PAID BASED ON OBJECTIVE FACTORS AND PRINCIPLES OF EQUITY.

THE ADVANTAGE:

Using consistent and transparent pay policies is simple and efficient, and helps you attract and retain top performers.

THE CONTEXT:

Because the hiring and onboarding process and timeline of a campaign is highly unstructured, the pay policies can be unstructured as well. Campaigns may find themselves concurrently hiring for vacant positions, but also trying to “snatch up” the best available talent and figure out how and where to place them on the roster later. If you don’t have a compensation plan and structure, you can botch your efforts to ensure equitable pay between comparable hires.

Pay equity has become a more broadly understood topic in recent years, and **workers are more and more likely to expect some degree of pay transparency.**³³ **Having pay policies that are clear, consistent, and transparent will make it easier for you to attract and retain top talent.** It will also avoid the morale disaster that comes along with staff discovering, through disclosure reports or media coverage, any unexplained pay differences. There is evidence that pay secrecy may in fact hinder work performance, and that pay transparency may be motivating to top performers.³⁴ In addition to the legal compliance and morale problems, **simple, consistent pay systems are easier to administer**, especially for those who may not have extensive pay-setting experience. Finally, **ensuring pay equity is a meaningful and easy way to demonstrate your campaign’s commitment to its stated values of equality.**

A SIDESTEPED SCENARIO:

You put systems in place (such as a position salary grid), to ensure equitable salary distributions. It comes to your attention several months into the campaign that a few people were allowed to negotiate higher salaries for themselves. One person was offered a higher salary at a competing campaign, and would only accept your offer if the hiring official could match the other offer. Another person left a highly lucrative technology position to join your team, and the hiring official tried to “meet in the middle” by deviating from the grid. During the subsequent evaluation of salaries, you realize that these negotiation anomalies have created a racially-based pay disparity. In order to rectify the differential, you’re forced to give raises to a dozen people, which puts an unexpected strain on your budget.



#PAYEQUITY STRATEGY CHECKLIST

- ✓ **Design a simple pay structure that corresponds with job descriptions.** One model is a pay grid or matrix³⁵ based on job category and objective measures of experience. This grid or matrix should dictate exact dollar amounts for jobs at different levels (as opposed to ranges). Define transparent and objective processes for pay increases.
- ✓ If you find pay premiums necessary, define each in writing and incorporate them into your matrix. Make them concrete, such as geographic location, or specific technical expertise. Be aware that pay based on performance is difficult to insulate from bias. Regardless of the factors you ultimately choose, research suggests that accountability and transparency mechanisms can reduce gender and race pay gaps.³⁶
- ✓ Limit pay negotiation. **If you must engage in a negotiation, commit to matching existing comparable staff at the same pay rate** - in some cases that might be required anyway. Negotiation and its responses can be influenced by race, gender, and other biases – be vigilant to ensure your campaign is not susceptible to it.
- ✓ Use your data and reporting skills to **monitor salaries for equity**. Be sure you are calculating race and gender pay gaps across the organization, and - if you have enough staff - for everyone in similar roles, and by department. While legally you may not be required to equalize pay in all these situations, you should understand where and why differences exist. Are they based on differences in experience? Meaningful differences in skills and level of responsibility? And are those differences clearly aligned with consistent principles or all over the map? Decide whether any differences are consistent with your values and whether if disclosed they could impact trust and morale. And consider, even if pay differences do not implicate race or gender bias, they might be worth addressing to retain staff and keep focus on the work and mission. Paying people with comparable jobs and experience levels the same is easier, cheaper and more compliant than paying people differently and hoping you can justify it.³⁷

SMALL CAMPAIGN TIP

Objective and defined pay structures usually save time and money and make it easier for managers to implement, even those who lack compensation expertise. This is an easy, low-cost strategy to foster equity.

PAY EQUITY AND RACIAL JUSTICE:

Pay equity is often presented in the context of gender disparities, while the existence of pay disparities on the basis of race or ethnicity can be overlooked – including the compounding impact of gender pay gaps and racial bias in pay for women of color. In the context of promoting racial justice and equality, it is particularly important that your campaign is not devaluing Black talent, or underpaying people of color compared to white counterparts.

SAMPLE SALARY MATRIX FOR FIELD STAFF:

Role	Base Amt	State-specific premium	Additional cycles of experience	Enhanced qualifications	Larger staff or operations
State Field Dir	\$\$\$\$	+ x%	+ y % (w max)	+ z %	+abc amt.
Dep Field Dir	\$\$\$	+ x%	+ y % (w max)	+ z %	+abc amt.
Regional Field Dir	\$\$	+ x%	+ y % (w max)	+ z %	+abc amt.
Field Organizer	\$	+ x%	+ y % (w max)	+ z %	+abc amt.

(components may be different for each phase or for certain states)



#LeadByExample

OUR LEADERSHIP WILL MODEL RESPECTFUL BEHAVIOR, AND OUR STAFF WILL RECEIVE THE TRAINING AND SUPPORT NEEDED TO REPORT, ADDRESS, AND RESOLVE WORKPLACE PROBLEMS.

THE ADVANTAGE:

Relevant training for management and staff can set standards for inclusive behavior, demonstrate a commitment to workplace fairness, and reduce the risk of harassment and other problematic behaviors. And research shows that inclusive leaders can help reduce turnover in diverse groups.³⁸

THE CONTEXT:

Anti-harassment, EEO, and management skills training are more common in traditional workplaces than they are on campaigns. Unsurprisingly, **many of the training scenarios and approaches developed for traditional workplaces may feel totally irrelevant to campaign work.** On top of all this, traditional trainings tend to be legalistic and compliance-oriented, and, according to social science research, not particularly effective.³⁹ And while an increasing number of campaigns are more focused on addressing racism and harassment in our communities and their own workplaces, just throwing together a training may not be the best approach.

As you evaluate the need for training, remind yourselves of the meaningful (and potentially formative) opportunity that training presents in framing how your staff – particularly younger and less experienced staff – think about workplace behavior and expectations. Young staffers who arrive at your campaign with a professional “blank slate” will have their first impressions of workplace norms and expectations shaped by the work culture you cultivate. They are likely to bring the lessons learned on your



campaign forward into their professional campaign careers. The junior staffers you hire today will become the senior staffers available for you, and others, to hire in the future. Building workplace norms of respect into the bedrock of their professional careers will make things smoother for you in the short term, and over time, may seep into the fabric of broader campaign culture.

A SIDESTEPED SCENARIO:

During a visit to a field office, you overhear a joke that someone makes about a new organizer “not meeting the hiring criteria.” You ask what they are referring to, and you learn that the field director, truly a superstar organizer who had been delivering on all their outreach targets, had been asking staffers coming in for interviews whether they were single or in a relationship. You sit down for a conversation with the field director and relay the information you heard, explaining that the question could be problematic for legal reasons, and for new hires’ feeling of inclusion. In the conversation, you realize that the field director asked the question under the mistaken and problematic assumption that doing so would help them gauge a candidate’s potential engagement and dedication at work. You realize the risk that your campaign has been opened to and recommit to ensuring that all staff with hiring responsibilities have received proper training on EEO and equity principles, including recruiting, interviewing, and onboarding.

#LEADBYEXAMPLE STRATEGY CHECKLIST

- ✓ Use evidence-based approaches, including **tailoring trainings to campaign work and using relevant risk factors in hypothetical situations**. They will resonate better with staff, and likely be more effective than off-the-shelf EEO compliance trainings.⁴⁰ Materials should be **accessible and easy to understand** -- we recommend a 6th grade reading level, available in writing, using Optical Character Recognition technology.⁴¹ Examples should address a range of behaviors and contexts, including after work or offsite activities, and varying levels of seriousness. Seek to incorporate **staff and leadership input** in developing the training, both to ensure a better reception, and to cultivate buy-in from staff.

TOPICS

- ✓ Provide regular staff and leadership training on harassment and respectful and inclusive workplaces.⁴² Training in bystander intervention strategies also shows promise.⁴³ In addition to providing information on what constitutes problematic behavior, **train managers (and possibly peers) on how to best respond to the behavior**. This gives workers the tools to evaluate how to become an ally to someone in the workplace. Address your policy and channels for raising concerns, including protections for confidentiality and non retaliation.
- ✓ Leadership training should include cultural competence, inclusive leadership, bias disruption, and strategies to prevent harassment and retaliation.
- ✓ Consider sharing personal stories or experiences to build a connection and demonstrate your understanding of how individual actions impact safety, inclusion and equity. Trainings focused on individual behaviors should be conceptually **linked to broader organizational values and systems**.⁴⁴

MAGNIFY IMPACT

- ✓ Incorporate reminders about inclusive workplace behavior and where to find additional resources in daily huddles, reporting check ins, or regular staff calls. Ask management to do periodic follow-ups to trainings to refresh the material.
- ✓ When online trainings are used, ensure the training is tailored and relevant to campaign work.

CONTEXT CONSIDERATIONS- COVID-19:

While typical circumstances suggest that in-person trainings are preferable, there will be periods of time during which in-person trainings are not possible or advised. Adapting existing trainings you've already developed for in-person use may require adjusting the material, activities, and format. For example, use two shorter online sessions instead of one longer in-person training. You may also want to consider adding hypothetical examples that are relevant to COVID-19 circumstances.





#Safe&Inclusive Culture

OUR STAFF WILL FEEL SAFE BEING THEMSELVES.

THE ADVANTAGE:

Staff can only deliver on their full potential if they feel safe being themselves. Empower them to focus on their work, rather than be distracted and dragged down by concerns about their safety, a toxic workplace culture, and mistrust of management. Staff who are not burdened by a toxic workplace culture will take appropriate risks, innovate, and share their concerns and perspectives to improve teams and ideas.

THE CONTEXT:

Keeping everyone safe — from physical threats, from psychologically toxic environments, and from escalating harassment — will allow your staff to focus on the campaign mission. All **operational and management decisions must be rooted in respect and inclusion**. Campaign leadership staff, across all departments, must be held responsible for **modeling respectful, professional, and inclusive behavior**. When campaign leadership does not respond appropriately to problematic behavior, especially if their response is viewed as shielding a harasser, this is likely to create immediate and long-term morale and engagement problems.

And one final point that cannot be emphasized enough: you can spend all the money in the world on hiring all the “right” people, bringing in high-profile consultants and lawyers, implementing model policies and procedures, using the latest technology, but if your leadership does not uphold campaign equity values and model it in their day to day management, all of those other investments can be fully negated.

A SIDESTEPED SCENARIO:

You have implemented a system to cultivate employee engagement in which field staff can submit candidate event pitches directly to senior leadership when the candidate has a planned visit to their region. You have had excellent uptake, HQ staff enjoys the opportunity to work with regional field staff, and field staff clearly feel empowered by the opportunity. There is one region with a particularly large LGBTQ community, but in two rounds you haven't received any pitches for an LGBTQ community-focused event. You call a trusted friend doing IT in that office, and learn that the field staff, some of whom were hired specifically to focus on LGBTQ outreach, see the regional field director as uncomfortable with gay and trans people. Apparently, this director has deprioritized LGBTQ outreach, and "forgets" to include LGBTQ priorities in their strategies and goals. When asked by staff to include sharing pronouns in meeting introductions, the director was dismissive and said it was unnecessary. You learn that some staff are requesting reassignment because of this behavior. You realize that no one in that office had been empowered or equipped to either step in or report the problem to HQ.



#SAFE&INCLUSIVE CULTURE STRATEGY CHECKLIST

PHYSICAL AND PSYCHOLOGICAL SAFETY

- ✓ Define **who is accountable to keep staff and volunteers safe** – consider designating an individual to act as a safety liaison to help troubleshoot housing and transportation risks, as well as provide real-time responses at events. Direct managers to respect concerns raised by staff from marginalized communities working alone in potentially hostile turf by offering partners or other alternatives, and seek to use a “buddy system” for travel.
- ✓ A great project for a local intern/junior staffer: **compile a staff resource guide** that contains contact and background information for local crisis hotlines, health care, support organizations, and other emergency resources specific to the area.
- ✓ Be aware of all channels in which harassing or problematic behavior could be occurring— email, phone, text, apps like Slack and Hangouts, or even Zoom chat boxes— and set the expectation that all communication must be respectful and inclusive. Ensure managers know how to intervene. **Addressing potential safety concerns regarding online communications is critical in a remote work environment.**
- ✓ Identify campaign conditions that may create risk for harassment and implement ways to mitigate them.
 - ▶ In particular, have **a clear policy about the responsible use of alcohol**. While historically, social activities that involve drinking have been part of campaign culture, if campaigns are workplaces, then it may be important to limit alcohol consumption during any official events or activities. (In addition to presenting a harassment risk factor, gender and culture can affect how social drinking is perceived or experienced).
 - ▶ Take **early action to check problematic behavior** before it becomes harassing.
 - ▶ **Provide multiple channels for reporting harassment and other workplace misconduct** and clearly communicate who should receive notice within the campaign.
 - ▶ Your policies should **recognize potential economic vulnerability**.

#SAFE&INCLUSIVE CULTURE STRATEGY CHECKLIST

INCLUSIVE LEADERSHIP

- ✓ When making leadership selections, consider the people and communication styles needed to create the culture and climate your campaign seeks to achieve. **Modeling professional, respectful, and inclusive workplace behavior should be part of the job description and evaluation for any leadership position** (not relegated to only those in EEO or D&I positions). Ensure adequate supervision and accountability in a decentralized operation.
- ✓ Campaign leaders must be willing to act to address ineffective field leadership and resulting toxic work cultures. When staff raise concerns, weigh the potentially serious consequences in failing to terminate toxic or potentially dangerous team members. Research suggests that in general, management can be hesitant to terminate high performers, even though the toxicity they bring to the workplace may very well outweigh their contributions.⁴⁵ Caution campaign leadership in taking any actions that may even be seen as protecting or shielding a harassing or otherwise problematic employee – perceptions are particularly important because of the short-term campaign timeline.⁴⁶
- ✓ Ensure that leadership are comfortable with tough conversations. Find ways to **ensure your staff have channels to discuss concerns about hostility, bullying, and intimidation**, which can often escalate into more serious forms of harassment. Foster an environment in which conversations are welcome on topics such as the underrepresentation of women and people of color in leadership and the impact of racial and gender bias within campaign power structures. Do not make thoughtful critiques of these sensitive topics taboo.

CONTEXT CONSIDERATIONS — COVID-19:

Typically, some workers choose not to share information about certain health conditions or family care responsibilities with their managers or coworkers, and it has no effect on their ability to be successful at work. The COVID-19 crisis may put people in the unfamiliar situation of feeling obligated or inclined to share this information to justify why they may have heightened concerns about contracting the virus, or have apprehension about engaging in certain activities that are increasingly added to the list of permissible activities under local, state, or federal guidelines. Think carefully about staff privacy and Americans with Disabilities Act concerns as you develop policies that may implicate sensitive information. Make sure you have a strong policy about workplace accommodations and communicate it clearly to existing staff, new hires and managers. Even if your campaign has cultivated an exceptional environment that conveys that it is accepting of disabilities, and all types of family care arrangements, some people may still prefer to keep this information private.



A photograph of a man in a dark shirt speaking at a podium, addressing a large crowd of people. The scene is dimly lit with warm, orange-toned lighting. The background shows the silhouettes of many people listening.

#ValuesInPractice

**OUR CAMPAIGN IS COMMITTED TO IMPLEMENTING
WORKPLACE POLICIES THAT OUR CANDIDATE
SUPPORTS ON THE CAMPAIGN TRAIL.**

THE ADVANTAGE:

Workers who see and directly experience their candidate's commitment to the values he or she champions will have more authentic interactions and honest testimonials to share with voters, stakeholders, and surrogates. This alignment makes their jobs easier.

THE CONTEXT:

Campaigns should align their own internal culture with their candidate's vision for a better world. You should strive to eliminate any gap between a candidate's platform for positive social change and the work experiences of the staff working to promote it. In addition to making your campaign vulnerable to a charge of hypocrisy, any discrepancy undermines your candidate's overall credibility and trust with voters.

The campaign workplace can often, by default, adopt an expectation of overwork and personal sacrifice and martyrdom, rooted in the mistaken belief that these conditions are inevitable in advancing broad societal change. This attitude can also contribute to campaigns falling short in building inclusive work environments that welcome and support people of color, women, LGBTQ individuals, individuals with disabilities, religious minorities, immigrants, or those from economically marginalized communities. Enacting progressive and fair workplace policies, and prioritizing campaign equity, may feel unrealistic or even impossible. But failing to do so may lose you a competitive edge. Having a diverse, engaged, and empowered staff, particularly in the field, can give you a competitive edge by providing perspectives informed by voter interaction.

A SIDESTEPED SCENARIO:

Your progressive candidate supports the full slate of best labor practices, including a \$15 federal minimum wage, paid parental leave, and paid sick leave. Your opponent is a moderate who takes a “business-minded” approach to policy, and refuses to endorse any labor policies that act as mandates on employers. One of your field offices receives a call from the head of a local organization, noting that they had seen a public post on Facebook written by one of your campaign’s community organizers, complaining that she could barely make rent because their paycheck had been docked due to taking several sick days in the prior week. They want to know why your campaign supports paid sick days but doesn’t provide paid sick leave to staff. You refer to the employee handbook and realize that there is no clear explanation of your campaign’s paid sick leave policy and how to claim it, even though it had been your intent to offer paid sick days. While you hope that this local leader doesn’t call a reporter with the same complaint, you also realize that you are not focused enough on aligning your policy agenda and your workplace values.



#VALUESINPRACTICE STRATEGY CHECKLIST

PROMOTING WORKER VOICE

- ✓ Provide opportunities for worker voice and engagement, for both staff and volunteers. Remain open to structures supporting collective action, like unions or other worker organizing efforts. Foster an appreciation across leadership for the value that engaged field organizers bring. Create mechanisms to incorporate field organizers' perspectives and feedback on strategy.
- ✓ Evaluate staff salaries and realistic costs of living. Examine ways to reduce the culture of overwork of both staff and volunteers. Because many campaign staff are economically vulnerable (younger, less financial stability, less robust networks), review how management and operational processes affect their livelihoods, particularly expense reimbursements, travel costs, and re-assignments.

CULTIVATE THE CULTURE

- ✓ Develop a **"culture code" that sets your campaign's values and norms** — share it on your campaign website and through social media. Request that leadership staff sign it and incorporate it into their management strategy. Leaders play a vital role in modeling the behaviors of respect and cultivating workplace culture. Train them on the importance of building inclusive workplaces and disrupting bias, including how to: respond and react to employees with intention, acknowledge mistakes, clarify expectations, and incorporate transparency into their management.
- ✓ Conduct a **top to bottom audit of your policy proposals and cross-check them against your workplace policies.** These can pop up in various areas: What is your candidate's view on marijuana legalization, and how does your hiring/screening policy treat low-level drug offenses? What are your candidate's views on non-compete, arbitration, or confidentiality clauses, and do they appear in any of your worker agreements? What about overtime, paid sick time, and parental/family leave? Does your candidate advocate for community/regional revitalization efforts but not dedicate any resources there?

SMALL CAMPAIGN TIP

Create opportunities to show appreciation and respect for staff. Brainstorm creatively, and ask your staff what recognitions or rewards would be meaningful to them. Many of these are free or low-cost: send senior leaders out to the field to bring meals or help hit call targets; invite staff to special events with the candidate; include individual or team shout outs in staff-wide emails and conference calls; say thank you.

CONTEXT CONSIDERATIONS - COVID 19:

Similar to the Sidestepped Scenario above, your candidate's response to the COVID-19 crisis is a truly make-or-break opportunity to demonstrate putting values into practice. Your campaign must adopt, at minimum, policies that are as worker- and volunteer-friendly as your candidate is promoting on the virtual campaign trail. Ensure that all managers and the candidate model best safety practices.

DON'T FORGET YOUR CANDIDATE

You know what they say about the best laid plans. Don't watch all of your hard work go up in flames by letting your candidate get on stage or in front of a camera without robust understanding and support of your campaign equity efforts (+ regular reminders, if needed). Ideally, you should have 110% buy-in from your candidate, and their trusted "kitchen cabinet." If your candidate has an eager kitchen cabinet in need of direction, put campaign equity on their agenda and see whether they can make helpful introductions to communities of interest and hiring referrals to run through the campaign's formal channels. An especially powerful tool is staff seeing their workplace values modeled by the candidate.



Some Additional Resources for Further Reading

BIAS

Mahzarin R. Banaji and Anthony G. Greenwald, *Blindspot: Hidden Biases of Good People* (2016).⁴⁷

Iris Bohnet, *What Works: Gender Equality by Design* (2016).⁴⁸

The Perception Institute resource page on explicit bias, implicit bias, stereotype threat and racial anxiety.⁴⁹

Kenji Yoshino and Christie Smith, *Fear of Being Different Stifles Talent*, Harvard Business Review (March 2014).⁵⁰

DISABILITY

Ted Kennedy Jr, Chad Jerdee, and Laurie Henneborn, *4 Ways to Improve your Company's Disability-Inclusion Practices*, Harvard Business Review, June 4 2019.⁵¹

Cornell Employment and Disability Institute, *Supporting the Creation of Disability Inclusive Workplaces* (2015).⁵²

HIRING

Laura Rivera, *Pedigree: How Elite Students Get Elite Jobs* (2014).⁵³

The Center for WorkLife Law University of California Hastings College of Law, *Bias Interrupters for Hiring and Recruiting: Identifying Bias in Hiring Guide*.⁵⁴

LGBTQ INCLUSION

Out & Equal, *20 Steps to an Out & Equal Workplace*.⁵⁵

Transgender Rights Toolkit: A Legal Guide for Trans People and Their Allies, Chapter 3: Workplace Rights and Wrongs.⁵⁶

INTERSECTIONALITY

Kimberle W. Crenshaw, Mapping the Margins: Intersectionality, Identity Politics, and Violence Against Women of Color, Stanford Law Review (1991).⁵⁸

MICROAGGRESSIONS

Derald Wing Sue, Microaggressions in Everyday Life: Race, Gender, and Sexual Orientation, (2010).

RACIAL EQUITY FOR NONPROFIT AND SOCIAL JUSTICE ORGANIZATIONS

Race to Lead: Confronting the Nonprofit Racial Leadership Gap (2017).⁵⁹

Race to Lead: Women of Color in the Nonprofit Sector (2019).⁶⁰

Itzbeth Menjivar, The Social Justice Sector Has an Internal Racism Problem.⁶¹

WORKPLACE HARASSMENT

EEOC Select Task Force on the Study of Harassment in the Workplace: Report.⁶²

EEOC Select Task Force on the Study of Harassment in the Workplace: Checklists and Charts.⁶³

Equal Rights Advocates' Sexual Harassment in the Workplace Toolkit.⁶⁴

UltraViolet, Guidelines for Campaigns: Preventing and Responding to Workplace Harassment and Sexual Violence.⁶⁵

ACKNOWLEDGMENTS:

This handbook was created by Peach Soltis and Pamela Coukos of Working IDEAL, based on work and concepts developed in partnership with Jenny Yang of Working IDEAL, Rene Redwood of Redwood Enterprise, and Doris Quintanilla of the Melanin Collective.

End Notes

- 1 Hall, A.T., Ask The Expert: How Can Employees Care for Their Mental Health While Working from Home? Research at Michigan State University. Retrieved from: research.msu.edu/ask-the-expert-how-can-employees-care-for-their-mental-health-while-working-from-home/.
- 2 Cortina, L. M., and Berdahl, J. L. (2008). Sexual Harassment in Organizations: A Decade of Research in Review. In J. 11 Barling and C. L. Cooper (eds.), The SAGE handbook of organizational behavior: Volume 1 Micro Approaches (469–497). London: Sage Publications.
- 3 Raver, J. L., & Gelfand, M. J. (2005). Beyond the Individual Victim: Linking Sexual Harassment, Team Processes, and 12 Team Performance. Academy of Management Journal, 48(3), 387–400. Retrieved from citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.530.198&rep=rep1&type=pdf.
- 4 Feldblum, C. and Masling, S. (2018, November). Convincing CEOs to Make Harassment Prevention a Priority. Harvard Business Review. Retrieved from hbr.org/2018/11/convincing-ceos-to-make-harassment-prevention-a-priority.
- 5 Buchanan, N.T., Settles, I.H., and O'Connor R.C., A Review of Organizational Strategies for Reducing Sexual Harassment: Insights from the U. S. Military, Journal of Social Issues (2014). Retrieved from: www.researchgate.net/publication/269419623_A_Review_of_Organizational_Strategies_for_Reducing_Sexual_Harassment_Insights_from_the_U_S_Military.
- 6 Equal Employment Opportunity Commission. Select Task Force on The Study of Harassment In the Workplace – Chart 9 of Risk Factors for Harassment and Responsive Strategies. Retrieved from www.eeoc.gov/eeoc/task_force/harassment/risk-factors.cfm.
- 7 Equal Employment Opportunity Commission. Select Task Force On The Study Of Harassment In The Workplace - 10 Report Of Co-Chairs Chai R. Feldblum & Victoria A. Lipnic. Retrieved from www.eeoc.gov/select-task-force-study-harassment-workplace, which concluded that “The least common response of either men or women to harassment is to take some formal action - either to report the harassment internally or file a formal legal complaint.”
- 8 National Academies of Sciences, Engineering, and Medicine. (2018). Chapter 4 in Sexual Harassment of Women: 15 Climate, Culture, and Consequences in Academic Sciences, Engineering, and Medicine (pp 47). The National Academies Press. Retrieved from www.nap.edu/read/24994/chapter/4#47.
- 9 Read more about microaggressions: D.W. Sue, A.I. Lin & D.P. Rivera, Racial microaggressions in the workplace: Manifestation and impact. In J. L. Chin (Ed.), Praeger perspectives: Race and ethnicity in psychology. Diversity in mind and in action, Vol. 2. Disparities and competence, (2009), retrieved from <https://psycnet.apa.org/record/2009-11472-010> ; M. Paz Galupo and Courtney A. Resnick, Experiences of LGBT Microaggressions in the Workplace: Implications for Policy, in Sexual Orientation and Transgender Issues in Organizations, 271 (2016), retrieved from www.researchgate.net/publication/301623779.
- 10 Equal Employment Opportunity Commission. Testimony of Erin Wade, Founder and CEO of Homeroom. Retrieved 14 from www.eeoc.gov/eeoc/task_force/harassment/wade.cfm. The testimony describes a restaurant owner's experience of designing a color-coded alert system for wait staff to request manager attention to customers engaged in harassing behaviors.
- 11 Equal Employment Opportunity Commission. Written Testimony of Heidi-Jane Olguin, CEO of Progressive 16 Management Resources, Inc. Retrieved from www.eeoc.gov/eeoc/task_force/harassment/10-22-15/olguin.cfm, describing a “multifaceted” complaint system as “critical.”
- 12 Feldman-Summers, S. (2000). Analyzing Anti-harassment Policies and Complaint Procedures: Do They Encourage 19 Victims to Come Forward? The Labor Lawyer, 16(2), 307–317. Retrieved from www.jstor.org/stable/40862738.
- 13 Openheimer A. J.D. (October 2002). Investigating workplace harassment: 10 steps to success. You and The Law, 6. 20 Retrieved from amyopp.com/wp-content/uploads/2013/06/Investigating_Workplace_Harassment.pdf.
- 14 Houk, C. S. & Rowe, M. P. & Katz, D. A. & Katz, N. H. & Marx, L. & Hedeem, T. (2016, November 14), The

- Ombudsman 17 in Federal Agencies. Administrative Conference of the United States. Retrieved from www.acus.gov/report/ombudsman-federal-agencies-final-report-2016; Waks, J. W., Vanderlip, N. L., Lipsky, D. B., CPR Institute for Dispute Resolution., CPR Institute for Dispute Resolution., 18 & Scheinman Institute on Conflict Resolution. (2014). Cutting edge advances in resolving workplace disputes. New York, NY: International Institute for Conflict Prevention & Resolution. Retrieved from mitsloan.mit.edu/shared/ods/documents/?DocumentID=4004.
- 15 Ultraviolet, PB Work Solutions and Works In Progress. Guidelines for Campaigns: Preventing and Responding to 13 Workplace Harassment and Sexual Violence. Retrieved from weareultraviolet.org/guidelines.
 - 16 Scott, A., Kapor Klein, F., McAlear, F., Martin, A., Koshy, S., The Leaky Tech Pipeline: A Comprehensive Framework for Understanding and Addressing the Lack of Diversity across the Tech Ecosystem (2018), retrieved from: mk0kaporcenter5ld71a.kinstacdn.com/wp-content/uploads/2018/02/KC18001_report_v6-1.pdf.
 - 17 National Academies of Science, Engineering, and Medicine, "Promising Practices for Addressing the Underrepresentation of Women in Science, Engineering, and Medicine: Opening Doors" (2020). Retrieved from: www.nationalacademies.org/our-work/increasing-the-number-of-women-in-stemm.
 - 18 Rivera, L., Firms Are Wasting Millions Recruiting on Only a Few Campuses, Harvard Business Review (2015), retrieved from: hbr.org/2015/10/firms-are-wasting-millions-recruiting-on-only-a-few-campuses.
 - 19 Equal Employment Opportunity Commission. Testimony of Ben Jealous, Partner at Kapor Capital. Retrieved from www.eeoc.gov/es/meetings/24090/transcript#Jealous.
 - 20 Williams, J.B., Accountability as a Debiasing Strategy: Testing the Effect of Racial Diversity in Employment Committees, 103 Iowa L. Rev. 1593-1638 (2018).
 - 21 Rock, D. & Grant, H. (2016, November 4). Why Diverse Teams Are Smarter. HBR.org. Retrieved from hbr.org/2016/11/why-diverse-teams-are-smarter.
 - 22 Lee, R. K., Core Diversity, 19 Temp. Pol. & Civ. Rts. L. Rev. 477, 508 (2010).
 - 23 Equal Employment Opportunity Commission, Office of Federal Operations. (2018, January 17). Barrier Analysis: 3 Questions to Guide the Process. Retrieved from www.eeoc.gov/federal/directives/barrier-analysis.cfm.
 - 24 Opportunity@Work, Focus on the Opportunity Gap, Not the Skills Gap. Retrieved from mk0opportunitya146yq.kinstacdn.com/wp-content/uploads/2019/12/Opportunity-Gap.pdf; Rebecca Knight, 7 Practical Ways to Reduce Bias in Your Hiring Process, SHRM (2019). Retrieved from www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/7-practical-ways-to-reduce-bias-in-your-hiring-process.aspx.
 - 25 Pragya Agarwal, Here is How Bias Can Affect Recruitment in Your Organisation, Forbes (Oct. 19, 2018). Retrieved from: www.forbes.com/sites/pragyaagarwaleurope/2018/10/19/how-can-bias-during-interviews-affect-recruitment-in-your-organisation/#27c7e5061951; The Center for WorkLife Law University of California Hastings College of Law, Bias Interrupters for Hiring and Recruiting: Identifying Bias in Hiring Guide. Retrieved from: biasinterrupters.org/wp-content/uploads/Identifying-Bias-in-Hiring-Guide-no-citations.pdf. Read more about bias: Iris Bohnet, How to Take the Bias Out of Interviews, Harvard Business Review (2016), available at: hbr.org/2016/04/how-to-take-the-bias-out-of-interviews; Joan C. Williams and Sky Mihaylo, How the Best Bosses Interrupt Biases on Their Teams, Harvard Business Review (Nov.-Dec. 2019), available at: hbr.org/2019/11/how-the-best-bosses-interrupt-bias-on-their-teams.
 - 26 Bauer, C. C., & Baltes, B. B. (2002). Reducing the effects of gender stereotypes on performance evaluations. Sex Roles: 6 A Journal of Research, 47(9-10), 465-476. Retrieved from cos.gatech.edu/facultyres/DiversityStudies/BauerBaltes.pdf.
 - 27 RepresentWomen. The Rankin-Chisholm Rule. Retrieved from www.representwomen.org/the_rankin-chisholm_rule.
 - 28 Johnson, S. K. & Hekman, D. R. & Chan E. T. (2016, April 26). If There's Only One Woman in Your Candidate Pool, There's Statistically No Chance She'll Be Hired. Retrieved from hbr.org/2016/04/if-theres-only-one-woman-in-your-candidate-pool-theres-statistically-no-chance-shell-be-hired.
 - 29 Kalev, A., Dobbin, F., & Kelly, E. (2006). Best Practices or Best Guesses? Assessing the Efficacy of Corporate 7 Affirmative Action and Diversity Policies. American Sociological Review, 71(4), 589-617. Retrieved from inequality.stanford.edu/sites/default/files/media/_media/pdf/key_issues/organizations_policy.pdf, concluding

that “two-way interactions with responsibility structures did render training, evaluation, networking, and mentoring more effective.”

- 30 Dobbin, F. & Kalev, A. (2017, November 15). Training Programs and Reporting Systems Won't End Sexual Harassment. 2 Promoting More Women Will. HBR.org. Retrieved from hbr.org/2017/11/training-programs-and-reporting-systems-wont-end-sexual-harassment-promoting-more-women-will.
- 31 Flaherty, Colleen (2020, April 21). No Room of One's Own. Inside Higher Ed. www.insidehighered.com/news/2020/04/21/early-journal-submission-data-suggest-covid-19-tanking-womens-research-productivity.
- 32 Center for American Progress On the Frontlines at Work and at Home: The Disproportionate Economic Effects of the Coronavirus Pandemic on Women of Color (2020, April 23). Retrieved from www.americanprogress.org/issues/women/reports/2020/04/23/483846/frontlines-work-home/.
- 33 Cooney, S. (2018, August 14). Should You Share Your Salary With Co-Workers? Here's What Experts Say. Time. Retrieved from time.com/5353848/salary-pay-transparency-work/.
- 34 Loudenback, T. (2017, May 3). More tech companies have stopped keeping employee salaries secret — and they're seeing results. BusinessInsider. Retrieved from www.businessinsider.com/why-companies-have-open-salaries-and-pay-transparency-2017-4.
- 35 Buffer's Transparent Salary Calculator. Retrieved from buffer.com/salary/staff-engineer/average.
- 36 Castilla, E., Accounting for the Gap: A Firm Study Manipulating Organizational Accountability and Transparency in Pay Decisions, Organization Science (2015). Retrieved from: dl.acm.org/doi/abs/10.1287/orse.2014.0950.
- 37 Transcript of interview with Pamela Coukos by Association of MIT Alumnae, amita.alumgroup.mit.edu/s/1314/bp19/interior.aspx?sid=1314&qid=20&pgid=53821.
- 38 Nishii, L.H. & Mayer, D. Do inclusive leaders help to reduce turnover in diverse groups? The moderating role of leader-member exchange in the diversity to performance relationship. Journal of Applied Psychology, (2009). Retrieved from: pdfs.semanticscholar.org/846a/dd80c097c67702578e8ff20cd6a38ba4398e.pdf.
- 39 Lauren Edelman, What's the Point of Sexual Harassment Training? Often to Protect Employers. Washington Post (2017, Nov. 17). Retrieved from www.washingtonpost.com/outlook/whats-the-point-of-sexual-harassment-training-often-to-protect-employers/2017/11/17/18cd631e-c97c-11e7-aa96-54417592cf72_story.html.
- 40 Tippet, E., Harassment Trainings: A Content Analysis. Berkeley Journal of Employment and Labor Law (2018), p 48. retrieved from: papers.ssrn.com/sol3/papers.cfm?abstract_id=2994571.
- 41 AbbyyFineReader PDF, "What is OCR and OCR Technology?" Retrieved from: pdf.abbyy.com/what-is-ocr/.
- 42 Equal Employment Opportunity Commission. Select Task Force On The Study Of Harassment In The Workplace - 22 Report Of Co-Chairs Chai R. Feldblum & Victoria A. Lipnic. Retrieved from www.eeoc.gov/select-task-force-study-harassment-workplace. The report notes that “in studies of attorneys and court employees, researchers found significant correlations between incivility and gender harassment.”
- 43 Equal Employment Opportunity Commission. Select Task Force On The Study Of Harassment In The Workplace - 23 Report Of Co-Chairs Chai R. Feldblum & Victoria A. Lipnic. Retrieved from www.eeoc.gov/select-task-force-study-harassment-workplace. The report notes that “a few researchers have explored the potential of using bystander intervention training in the workplace, and they are encouraged by the possibilities.”; Laschinger, H. & Leiter, M. & Day, A. & Gilin-Oore, D. & P Mackinnon, S. (2012). Building Empowering Work 24 Environments That Foster Civility and Organizational Trust. Nursing research. Retrieved from www.academia.edu/21037164/Building_Empowering_Work_Environments_That_Foster_Civility_And_Organizational_Trust.
- 44 Frank Dobbin & Alexandra Kalev (2018). Why Doesn't Diversity Training Work? The Challenge for Industry and 25 Academia. Anthropology Now, 10(2), 48-55. Retrieved from scholar.harvard.edu/files/dobbin/files/an2018.pdf. The authors assert that the “key to improving the effects of training is to make it part of a wider program of change.”
- 45 Housman, M. & Minor, D. (Nov. 15) Toxic Workers, Harvard Business School, Working Paper 16-057, 3 Retrieved from www.hbs.edu/faculty/Publication%20Files/16-057_d45c0b4f-fa19-49de-8f1b-4b12fe054fea.pdf.
- 46 Lee, J. and Jensen, J. The Effects of Active Constructive and Passive Corrective Leadership on Workplace Incivility and the Mediating Role of Fairness Perceptions. Group and Organization Management (2014). Retrieved from: journals.sagepub.com/doi/10.1177/1059601114543182.
- 47 blindspot.fas.harvard.edu/.

- 48 Watch her Ted Talk here: www.youtube.com/watch?v=0KgevAOMHCA.
- 49 perception.org/research/.
- 50 hbr.org/2014/03/fear-of-being-different-stifles-talent.
- 51 hbr.org/2019/06/4-ways-to-improve-your-companys-disability-inclusion-practices.
- 52 www.dol.gov/sites/dolgov/files/ofccp/regs/compliance/ResourcesFederalContractors_files/S_Bruyere_3-27-15_ILR_NYC_JRF_QA_508c.pdf.
- 53 Here's a review: medium.com/@faroukkadous/review-of-pedigree-how-elite-students-get-elite-jobs-by-lauren-rivera-c0feb9930f76.
- 54 biasinterrupters.org/wp-content/uploads/Identifying-Bias-in-Hiring-Guide-no-citations.pdf.
- 55 outandequal.org/20-steps/.
- 56 www.lambdalegal.org/sites/default/files/transgender_booklet_-_workplace.pdf.
- 57 www.hrc.org/resources/workplace.
- 58 www.ted.com/talks/kimberle_crenshaw_the_urgency_of_intersectionality?language=en.
- 59 racetolead.org/race-to-lead/.
- 60 racetolead.org/women-of-color/.
- 61 sojo.net/articles/social-justice-sector-has-internal-racism-problem (2019).
- 62 www.eeoc.gov/select-task-force-study-harassment-workplace.
- 63 www.eeoc.gov/checklists-and-chart-risk-factors-employers.
- 64 www.equalrights.org/wp-content/uploads/2019/09/Toolkit-for-Advocates-Sexual-Harassment.pdf
- 65 weareultraviolet.org/guidelines.

PHOTO CREDITS:

- Cover Official White House Photo by Samantha Appleton. Duotone filter added.
- Page 11 Edward Kimmel. www.flickr.com/photos/mdfriendofhillary/30781820236/. Duotone filter added.
- Page 26 Official White House Photo by Samantha Appleton. Duotone filter added.
- Page 32 Fabrice Florin. www.flickr.com/photos/fabola/30774290348/in/album-72157671194499647/. Duotone filter added.
- Page 35 Eric Blomstrom. Clean Energy Resource Teams. www.flickr.com/photos/mncerts/5342889954/in/photostream/. Duotone filter added.
- Page 36 Fabrice Florin. www.flickr.com/photos/fabola/45678224042. Duotone filter added.
- Page 40 Fabrice Florin. www.flickr.com/photos/44124339301@N01/43925383384. Duotone filter added.