

# Social Mapping Project

## Consolidated Report of Findings and Recommendations

EXECUTIVE SUMMARY AND RECOMMENDATIONS

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# EXECUTIVE SUMMARY

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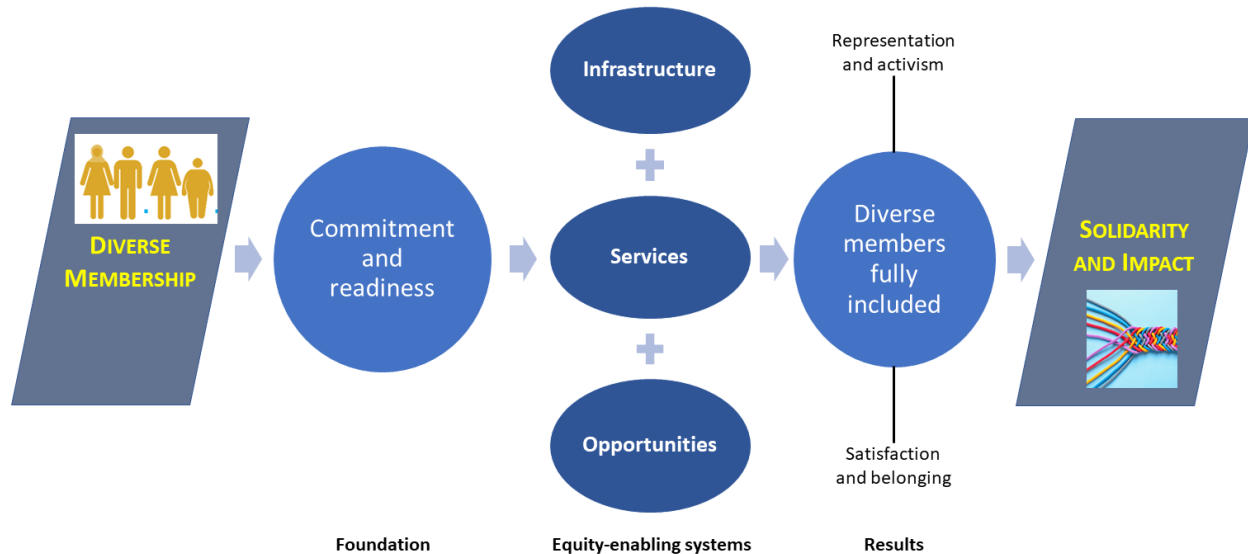
The work on this OPSEU/SEFPO Social Mapping initiative – mandated at OPSEU’s 2017 Convention – kicked off in mid-2019 to provide a comprehensive view of the union’s diversity, equity and inclusion indicators and practices. In particular, it has included:

- A Membership Systems Review to identify positive practices and unintended systemic barriers to inclusion of the full diversity of OPSEU/SEFPO members. This involved an extensive documentation review and a series of fact-finding interviews; inputs from more than 50 members through interviews or focus groups; consultations with the Equity Committees/Caucuses; targeted analysis of the census survey responses; and an external review that highlighted relevant good practices from 14 other labour organizations.
- A Member Survey to collect current data on the demographics of the membership and their experiences of the OPSEU/SEFPO environment and practices. This online survey attracted responses from over 27,000 members. It provided a robust sample for an extensive set of analyses at the level of the overall membership as well as within seven ‘groups of focus’ and their intersecting identities.
- Close collaboration with the Equity Unit and the SMP Committee, and the Equity Committees/Caucuses to compile information, identify priorities, guide the analysis, provide insights and interpret findings.

Two more detailed technical reports accompany this “Consolidated Report”. They provide greater detail on the methodologies that were used as well as presenting the specific results of the demographic census survey and the membership systems review.

This Consolidated Report focuses most directly on the *implications* from the Membership Systems Review and the Membership Census. It presents 49 recommendations clustered in 15 categories.

To move from a “social map” to a “roadmap” for action, the findings and recommendations have been structured according to the following causal model (see below). The model shows that the starting point for effective equity systems is a foundation of commitment and readiness within the union. A diverse membership provides the ‘raw ingredients’ that, when effectively engaged and equitably united, can generate the strength of solidarity and impact that OPSEU/SEFPO desires.



### Starting with the end in mind: Why does equity matter?

The OPSEU/SEFPO Harassment and Discrimination Policy (HDPP) captures it well. It states that “equity issues are central to representing and defending members’ rights in the workplace, Union and community.”

The workplaces that OPSEU/SEFPO represents and the new ones it seeks to organize have more and more diversity among their employees. Societal demands related to equity and inclusion are increasingly urgent. For OPSEU/SEFPO to continue to remain relevant, strong and united it needs to harness the energy of a diverse membership. Within the last ten years since the first SMP, the membership has evolved, strengthening the clear ‘business case’ for equity. Members who self-identify within an equity-seeking group are an increasing proportion of the membership, including:

- Young Workers – from 22% in 2010 to 26% in 2020
- Racialized members – from 10% to 14%
- People with disabilities – from 9% to 14%
- People with a sexual orientation other than heterosexual – from 5% to 10%
- There are slight increases in the percentages of women (72%) and the percentages of Indigenous members (6.5%); the percentage of francophones has remained relatively stable (9%)

OPSEU/SEFPO members identify with over 125 different ethnic or cultural backgrounds. Individually, over half of the respondents (54%) identify with two or more ethnic/cultural groups. They speak more than 90 different languages. Individually, almost three in ten respondents (28.6%) report they are comfortable in more than one language.

## Tracking results and progress

The purpose of equity-enabling systems (see model, above) is to help OPSEU/SEFPO close any gap between the current state and an ideal state of diverse members' participation and engagement. A complete picture of the current situation has two aspects: a quantitative perspective and a qualitative perspective:

- From a quantitative point of view, are the groups of focus involved at the rates that one would expect? What are their rates of participation and activism?
- From a qualitative point of view, do members from the groups of focus have an experience that feels fair and inclusive? Do they feel that they 'belong' in the union?

Although the census reveals some gaps in representation when comparing elected/appointed leadership roles to the overall membership, the gaps do not appear to be large. These gaps are narrowing since 2010. This is a positive indicator. However, many members, and particularly those in some of the groups of focus, experience barriers to full participation in union activities. To cite only some examples: young workers, newer members, racialized members, and people with disabilities report lower levels of engagement, less certainty that the union leadership or campaigns reflect their interests, and/or more barriers to their involvement.

## There are three categories of 'Enabling Systems' that can drive change

1. Systems that are directly focused on building equity-related capacity in the organization:
  - Equity Committees and Caucuses are an important building block; the review shows that they could be leveraged to greater advantage for stronger, more widespread impact.
  - Some equity-related courses and supporting materials are in place. Some updating is required. In the current societal context, a strategically focused expansion of these resources is called for. Targeted development for leaders would make good sense.
  - Some attention and practical actions are suggested that could help to have a consistently effective process for assessing and resolving equity-related elements within member complaints.
  - A focus on the desired *impact* of equity-related actions, and clearer accountabilities and monitoring, would help put some 'teeth' into OPSEU/SEFPO stated commitments.
2. Processes that meet or exceed diverse members' expectations of 'belonging':
  - In general OPSEU/SEFPO practices for accommodating individual needs are in place. There are several enhancements that would bring them to a level that will meet the evolving characteristics and expectations of an expanding and increasingly diverse membership.
  - Updated approaches to communications – style, messaging, vehicles and grassroots support – could have a stronger impact in building commitment, sense of belonging, and awareness of issues of diversity, equity and inclusion within today's (and tomorrow's) evolving membership population.

- Among some of the equity-seeking groups, as many as 1 in 6 members do not feel that the union's campaigns and initiatives reflect their interests and concerns. Actions to build diversity into the campaign and bargaining processes are recommended, to help uncover and address issues of importance to all members.
  - To maintain and strengthen a sense of 'belonging' among the members, particularly those who are members of equity-seeking groups, an intentional set of initiatives can be implemented to support an evolution of the culture and leadership style of the union. The desired outcome is a welcoming and respectful climate fostered by an inclusive leadership approach.
3. Systems that enhance equity in opportunities for involvement:
- Members reported that the most common barriers to being more involved are 'lack of time' and 'scheduling of events is inconvenient' (1 in 3 members and 1 in 4 members, respectively). Significant numbers also reported that not being aware of opportunities posed a barrier to them. Some innovative problem-solving could help make inroads here; there are recommendations and actions suggested within the report.
  - Some of the processes for accessing training and development opportunities are informal and can fall prey to unintended biases. Modernized and more flexible training methods are not yet fully utilized, maintaining some longstanding barriers in access. We have suggested more attention to approaches that would build and monitor the diversity of the 'talent pipeline'.
  - Elections are a central process of concern within the union environment. There are several constraints to diverse participation, such as barriers to new candidates becoming known, inflexible voting processes, an acceptance of small quorum numbers, a reliance on verbal communication skills, etc. Particularly during the COVID pandemic there are opportunities to revisit traditional practices.

## Moving to action

The report's concluding statement includes: "While much has been done, much remains to be done." Over the years, OPSEU/SEFPO has achieved an impressive track record of commitment to equity. The evidence from the current initiative suggests that there is a compelling need now to continue to put actions to those commitments. The recommendations in the report, with their associated suggested actions, provide the ingredients for an aggressive agenda. The current context can be difficult – a heightened public focus on diversity, equity and inclusion while simultaneously the pandemic creates job loss and health concerns. This current review is reassuring that some innovative ideas, paired with a commitment to continuing to make progress, will enable OPSEU/SEFPO to move forward.

# SUMMARY OF RECOMMENDATIONS

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**Notes:**

Recommendations are accompanied by “Suggested approaches”. The suggestions are provided to round out the recommendation, but there could be alternatives that would be equally effective and more appropriate for OPSEU/SEFPO’s context. What matters is achieving the desired impact. OPSEU/SEFPO will monitor and report on the implementation of these recommendations. A separate tool (spreadsheet) has been provided to detail information such as responsible parties, actions taken (e.g. resolution to Convention, or motion to Board), rationale (including any adjusted approaches to achieving the intended result, if needed), and timing.

#	Recommendation	Suggested Approach
	<b>Intended result</b>	<i>To increase the diversity of the OPSEU/SEFPO membership.</i>
1.	Build advance capacity and readiness to effectively organize workplaces with significant populations in the groups that show under-representation in the OPSEU/SEFPO membership compared to the Ontario population (i.e. immigrants and some racialized groups).	Develop and pilot an organizing diversity strategy that assesses and seeks to close current strengths and gaps for organizing workplaces with workers in the under-represented groups of focus. Identify appropriate pilots (two or three potential target populations and related sectors <sup>1</sup> ) for implementation in 2021-2022 with an explicit evaluation and post-action review for learning and possible extension. To include: <ul style="list-style-type: none"> <li>• Organizing small workplaces with precarious work, where the groups of focus may be over-represented.</li> <li>• Identifying, educating and supporting members who can be effective in organizing with the targeted populations (i.e. Equity Committee/Caucus members and members from the groups of focus).</li> <li>• Materials with messaging and images customized to the targeted populations.</li> <li>• Indicators of success.</li> </ul>
2.	Encourage relevant representatives at all levels of OPSEU/SEFPO to seek to influence their employers to make substantial progress on issues of diversity, equity, inclusion and anti-racism.	Update the Employment Equity, Affirmative Action and related provisions in the <i>Policy Manual</i> to better reflect current best practices and language related to diversity, equity, inclusion and anti-racism approaches within workplaces. Once complete, provide executives, bargaining and labour-management committees at all levels of OPSEU/SEFPO with supporting educational materials and appropriate bargaining positions or suggested language.



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3.	Establish an objective for 2021 to increase the number of signed members, with a particular goal to increase signing rates within the groups of focus.	Leverage the results of the current SMP project to raise the visibility of OPSEU/SEFPO among workers who are not signed members. Consider a cascading communications process of the key findings, with messaging particularly targeted to having people feel they would be welcomed and included. Send a 'call-out' to members of the groups of focus, asking them to encourage colleagues in their network to sign a membership card and provide their contact information. Provide appropriate messaging for them to use.
<b>Intended result</b>		<i>To create metrics that will support accountability and transparency related to equitable participation.</i>
4.	Establish metrics and transparent reporting on diversity in leadership. Regularly assess the diversity and representativeness of the OPSEU/SEFPO leadership population at the local, regional and provincial levels, comparing the counts to the membership data available from the OPSEU/SEFPO census.	Undertake a continuing process of monitoring the diversity of OPSEU/SEFPO leadership populations. Establish a confidential data system <sup>2</sup> for elected leaders to voluntarily self-identify their equity characteristics and to update it after every election cycle (i.e. next provincial and regional/division elections and immediately thereafter to follow local election cycles).
5.	Establish numerical goals for representation of the groups of focus in leadership positions.	Each division, region and OPSEU/SEFPO provincially should establish 'stretch' targets for the representation of groups of focus in local president positions and in division/region/provincial executive positions. In particular, representation targets should address: women, young workers, francophones, black, non-black racialized, Indigenous, persons with disabilities and members of the LGBTQ2S community. Targets for divisions and regions should reflect the available data on their membership from the census.
<b>Intended result</b>		<i>To be able to respond to member satisfaction with their experience and a sense of 'belonging' in the union.</i>
6.	Establish metrics and transparent reporting on a sense of inclusion and belonging. This could be combined with other measurement processes that would support OPSEU/SEFPO's ability to consistently understand and meet members' needs, by assessing the membership's satisfaction with OPSEU/SEFPO, exploring their perspectives on emerging social	Undertake a continuing process of monitoring the perspectives of OPSEU/SEFPO members on issues of critical importance. Implement a short annual (or more frequent) pulse-taking survey available through the OPSEU/SEFPO website. Include key demographic questions to allow for disaggregating the data for groups of focus. Report the results to the membership.

#	Recommendation	Suggested Approach
	issues, identifying their priorities for the value they get from their OPSEU/SEFPO membership, etc.	
<b>Intended result</b>		<i>To ensure a high level of OPSEU/SEFPO leader awareness, skills, and commitment to be champions of equity, diversity and inclusion.</i>
7.	Ensure that Board members, and then other leaders, have completed equity-related training and have access to additional guidance and coaching as needed to become champions of equity, diversity and inclusion.	Identify or develop appropriate learning resources (see other recommendations) that can be the basis of equity learning pathways for leaders. Introduce a policy that all newly elected or appointed officers at the sector, division, regional and provincial levels will complete an individualized equity-related learning plan within three months of taking office (see Recommendation #15). Pilot the same approach with up to 20 locals where there is interest. Evaluate the outcomes, adjust as needed and roll out to the other locals. Identify potential mentors or coaches who could support individual executives (sector, division, regional, or provincial levels) on an ongoing basis. On a short-term basis, engage representatives of the Equity Committees/Caucuses to be Board advisors (see Recommendation #11).
8.	Add Equity, and/or Inclusiveness, to the set of ethical principles that are meant to guide the Executive Board. <sup>3</sup>	Amend the <i>Policy Manual</i> section 9.1-3, "Ethical Principles".
<b>Intended result</b>		<i>To increase the impact of the Equity Committees and Caucuses.</i>
9.	Revisit, clarify and communicate the purpose and goals of the Equity Committees and Caucuses.	Engage the Committees and Caucuses in a collaborative review of their mandates to determine if they are appropriately focused on the desired impact in the current context for diversity, equity, inclusion and anti-racism within and outside of OPSEU/SEFPO. Confirm or revise the mandates as agreed, perhaps at the Equity Gathering 2022. Develop accountability measurements, with a strong focus on impact and outcomes, to be embedded into Committee/Caucus workplans starting in 2022.
10.	Use the Committees/Caucuses to encourage networks or 'affinity groups' for their	Engage the Equity Committees and Caucuses in supporting the development of grassroots efforts to build active networks of members within their groups of focus. Specifically, identify best practices and create supporting resources to enable the

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	communities within the local, sectoral and/or Divisional structures.	Committees/Caucuses to be successful in this regard; this could be a topic at an Equity Gathering. Allocate an appropriate budget to the Committees / Caucuses to support this work.
11.	Use the Equity Committee/Caucus members more effectively to inform issues within OPSEU/SEFPO practices, policies and campaigns.	<p>As a matter of principle, OPSEU/SEFPO should commit to actively seeking the perspective of the groups of focus on an ongoing basis and particularly in decisions related to policies and campaigns. This principle can be embedded in policy directions such as:</p> <ul style="list-style-type: none"> <li>• Consult with the Disability Rights Caucus when planning regional or provincial meetings.</li> <li>• Seek guidance from the Indigenous Circle on appropriate land acknowledgment, smudging, elder involvement and other practices for all regional and provincial meetings. While this typically occurs at present, it would be stronger to commit to it in policy documents, perhaps extending the practice to meetings at other levels.</li> <li>• Leaders of OPSEU/SEFPO campaigns will advise Equity Committees/Caucuses of upcoming campaigns and collaboratively seek opportunities to connect the campaign to relevant issues for each group of focus.</li> <li>• Executive meetings at the sector, divisional, regional, and Board levels should routinely include three representatives from the Equity Committees/Caucuses on a rotational basis to highlight and advise on equity-related considerations as needed. These individuals will have a voice but not a vote. They may likely need training and guidance to be equipped to do this work effectively. For example, it would be understood that a representative from any given committee would be expected to raise considerations beyond their own group of focus. As such, equity committee representatives must build their understanding of intersectional and other group-specific issues.</li> </ul>
12.	The members of the Equity Committees and Caucuses should adopt an explicit goal of building and demonstrating their awareness of intersectional issues.	<p>The Equity Committees and Caucuses should collaboratively develop a three-year work plan to enhance their ability to address intersectionality within their groups of focus. Progress and required updates to the plan should be reviewed annually at the Equity Gathering. Activities in the plan could include:</p> <ul style="list-style-type: none"> <li>• Explicitly seeking members who represent diversity within the group of focus.</li> <li>• Holding joint meetings between two Equity Committees/Caucuses.</li> </ul>

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		<ul style="list-style-type: none"> <li>• An explicit commitment that each Committee/Caucus will seek input from the others on initiatives such as conferences, campaigns, communication efforts, etc.</li> <li>• A targeted number of joint initiatives in each planning period, involving the active collaboration of two or more Committees/Caucuses.</li> <li>• Conducting joint or cross training.</li> <li>• Changing communication materials to acknowledge intersectionality.</li> </ul>
13.	Heighten the visibility and transparency of the Committees and Caucuses within the membership.	<p>Undertake an immediate investment in assessing and improving the information available to members regarding the work of the Equity Committees and Caucuses. This could include:</p> <ul style="list-style-type: none"> <li>• Conducting an audit of the information currently available to members, against criteria such as: user-friendly, easy to find, inclusive, clear language, etc.</li> <li>• Improving the functionality of the OPSEU/SEFPO website so that basic and recent information about the purpose and the activities of each of the Committees/Caucuses is readily available. In addition to listing the contacts for each region, it should explain why members might want to contact them, what support the member can expect, and how they can get involved in equity-related issues.</li> <li>• Providing information to new members at the time of application.</li> <li>• Providing links or at least website address for the Equity Committees/Caucuses where they are listed in the Owner’s Manual.</li> <li>• Ensuring inclusivity for ‘outsiders’ about how the Committees/Caucuses work, such as including in any call-out for members an explanation of how much time is expected (compensated and not compensated), travel requirements, scheduling constraints, learning and development opportunities, etc.</li> </ul>
<b>Intended result</b>	<i>To create a comprehensive approach that will build equity awareness and skills within the various levels of OPSEU/SEFPO membership.</i>	
14.	Invest immediately in updating current materials, enhancing the access, and creating new learning approaches for building equity-related skills and knowledge in OPSEU/SEFPO members.	<p>The Equity Unit along with the Equity Committees and Caucuses should develop a three-year Equity Learning Strategy with prioritized subject matter, clear outcomes and metrics, and innovative learning approaches for members. A component of this strategy should be focused on members in elected or appointed positions (see following recommendation).</p> <p>Create and pilot at least two new offerings for members in early 2021; evaluate the outcomes; adjust and extend as appropriate.</p>

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		<p>Consider the possibility of offering Open Digital Badges for successful acquisition of new skills. This could encourage individuals to make the effort. It would also be a credential that members could cite when seeking leadership positions. Finally, it would be a monitoring mechanism to track the ongoing increase in equity-related skills within the union.</p>
15.	<p>Require all newly elected leaders to engage in an individualized Equity learning pathway starting within three months of being elected. (See related Recommendation #7.)</p>	<p>Develop an Equity Learning Pathway toolkit that supports individual members and leaders to select, prioritize and use resources to meet their own needs. Ensure that the training available to new local stewards and presidents (at a minimum) through courses and the toolkit addresses updated and topical equity-related content relevant to their position, such as: engaging members of groups of focus in activism; uncovering systemic barriers in the workplace; recognizing unconscious bias; addressing anti-black racism; accommodation basics; Indigenous history and anti-colonialism; confronting hate; mental health first aid; etc. For more senior positions, develop a diversity mentoring or coaching service; require them to self-assess their level of knowledge on key topics including those listed above; curate a set of resources and learning opportunities appropriate to senior leadership roles.</p>
<b>Intended result</b>		<i>To enhance the capacity for the resolution of equity-related grievances and members' human rights complaints.</i>
16.	<p>Build the accountability and expectations of headquarters staff to identify and resolve subtle DEI issues that are embedded in grievances.</p>	<p>Consider amending the job description of Grievance Officer to strengthen the requirements for equity-related tasks, knowledge and competencies. For example, add language in the Major Tasks section related to equity/diversity/discrimination issues and identifying themes; add a specific knowledge item regarding potential workplace barriers faced by equity-seeking groups; increase the Valuing Diversity competency from a Level2 requirement to at least Level 3 or 4; and add specific reference to understanding and reflecting identity-related perspectives in reaching an agreed-upon solution. Consider revising the title of the competency from "Valuing Diversity" to "Fostering Equity".</p>
17.	<p>Build the capacity of local resources to understand and proactively address potential equity-related considerations in the grievance and human rights complaint process.</p>	<p>Develop and disseminate more 'just-in-time' resources (tip sheets, short online resources, training sessions, etc.) to members, stewards, grievance committee members and grievance officers regarding equity-related issues within the grievance process. This information should address not only the possible content of the complaint (grievance or human rights) but also the process itself. Review and update as needed the related training programs to embed similar content.</p>

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18.	Implement an appropriate process for knowledge-sharing among the Equity Committees/Caucuses, the OPSEU/SEFPO Equity staff and those who are directly involved in the grievance process.	Consider dedicating a segment of the Equity Gathering to 'workshop' systemic issues that are arising – in the external environment, within the grievance and human rights complaints process, or elsewhere – and the implications for OPSEU/SEFPO members. Design the workshop to surface intersectional issues, as well as those that may be specific to one of the groups of focus. At that time, the OPSEU/SEFPO staff should review the grievance and human rights complaint tracking to identify trends and determine appropriate actions, if any. Translate the results of the workshop discussion into pragmatic tips or guidance for local stewards, grievance committees and presidents. Develop a broader communication that summarizes the learning and any identified themes for distribution to the members; this will not only educate the members but demonstrate in a practical way the union's impact on creating more equitable workplaces.
<b>Intended result</b>		<i>To embed within OPSEU/SEFPO's equity-related work a culture of accountability, focus on impact and results, and measure progress.</i>
19.	Build capacity for measuring the diversity of members participating in OPSEU/SEFPO activities and decision-making processes, particularly at the local or 'grassroots' levels.	The SMP Committee (or an implementation task force) should undertake a two-year pilot project in a sample of up to 25 locals (varying in characteristics such as geography, size, occupational groups). The objective is to develop, apply and refine measurement processes that would provide a breakdown or 'diversity description' of members involved in many of the grassroots decision-making processes that are core to the operation of the union. Introduce a systematic process of collecting demographic data for key decision-making roles, such as voting in local elections; election/appointment to local leadership roles; selection as delegates to sector/regional meetings and Convention; participation on bargaining teams; and others. After two years, assess what has been learned about the measurement process and make appropriate tools widely available to all locals, sectors and regions.
20.	Introduce impact measurement tied to specific initiatives.	Adopt a policy that embeds equity impact as a consideration in each significant decision or investment. <ul style="list-style-type: none"> <li>• Require that each equity-related resolution have a clear definition of the intended benefit (what will change), an explicit description of what will lead to the change, and a process for evaluating, refining and sustaining the practice.</li> <li>• Require that each initiative or resolution have a clear assessment of the equity impact on the groups of focus. This should be a standard component of recommended changes.</li> </ul>

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21.	Plan to conduct a refreshed Social Mapping Project in five years.	<p>The SMP Committee (or implementation task force, if appropriate) should immediately start to document the impacts and changes arising from the current SMP initiative. This goes beyond tracking the completion of items in the recommendations. The goal is to be able to demonstrate the value that was obtained by completing the SMP. This builds on Recommendation #20. Each action undertaken as a result of the current SMP should be tied to a desired impact and a related indicator.</p> <p>The Committee should also conduct before the end of 2020 a 'post-action review' of the project, to confirm what went well and what could have gone better, and document the learnings.</p> <p>A resolution to Convention for a third SMP should be presented in 2024 at the latest. It should be supported by the documented impacts and the learnings from the current initiative.</p>
<b>Intended result</b>		<i>To strengthen practices that clearly demonstrate a commitment to respecting the rights and needs of individual members so that they can fully participate in union activities.</i>
22.	Strengthen the accommodation references to explicitly address grounds beyond physical disability and family status.	The Equity Unit should review the references to accommodation in the <i>Policy Manual</i> as well as in supporting materials, to include expanded references to accommodation practices for various protected grounds. The Equity Committees and Caucuses should be asked to provide input.
23.	Review the decision-making and funding process for supporting single occupancy hotel rooms at OPSEU/SEFPO events. Clearly frame it as an accommodation for specific needs within the OHRC protected grounds. Ensure clarity and consistency across the groups of focus, across types of events and across OPSEU/SEFPO Divisions/Sectors/Regions.	We recognize that this issue has been on the agenda for the Executive Board's consideration. Our review did not provide us with sufficient information to make a suggestion on a detailed policy approach for this recommendation. It would likely be cost-prohibitive to have single occupancy for all members at all events, although currently many of those costs may be borne anyway, through local and other budgets. At a minimum, a consistent practice aligned with OPSEU/SEFPO's other accommodation practices, with rationale and a protocol for making decisions, is needed and must be communicated. It may be sufficient to simply tighten and communicate the existing practices, until the longer-term impacts of pandemic changes are better known. At a later date, a more thorough review guided by the equity-related questions outlined above might be appropriate.
24.	Enhance the provision of child/dependent care.	Conduct a needs assessment among a sample of members and/or local executives. Draw upon available best practices (including CUPE: <i>Children Welcome &gt; A guide to inclusive on-site child care at CUPE events</i> ) to refine and then implement and monitor new

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		<p>procedures related to child/dependent care. The criteria for new procedures should include:</p> <ul style="list-style-type: none"> <li>• Extension to a wider array of union activities.</li> <li>• Clear definition of dependents who are covered.</li> <li>• Clear, member-friendly and consistent administrative procedures.</li> <li>• Standards for dependent care that meet members’ expectations for quality and safety.</li> <li>• Provision for culturally appropriate dependent care, with particular attention to the families of racialized, francophone and Indigenous members.</li> </ul>
25.	Engage locals more directly in the accommodation process for members who seek to be involved in union activities.	The Equity Unit should develop a multi-year plan to gradually equip local executive members to be accountable for accommodating the needs of their members related to local activities. This effort should be carried out with direct input from the Equity Committees and Caucuses. For both efficiency and effectiveness, it should also be conducted in conjunction with other recommendations for building local capacity.
26.	Accelerate the efforts to ensure that OPSEU/SEFPO is fully AODA compliant.	These efforts are already underway. An annual reporting to the Executive Board should be used for monitoring progress and taking corrective action where needed. Input and support from the Disability Rights Caucus should be sought.
<b>Intended result</b>		<i>To implement communication practices that reflect evolving expectations from diverse members and build a stronger capacity for equity-supportive communications throughout the union.</i>
27.	Develop and implement a checklist that can be used for reviewing all communication content, messaging and vehicles through a diversity, equity and inclusion lens. This tool could also be used to good effect when creating or updating educational materials.	<p>The Equity Unit could collaborate with the Education and Communication units as well as the Equity Committees and Caucuses to create the checklist. It should include criteria such as:</p> <ul style="list-style-type: none"> <li>• Updated and appropriate language.</li> <li>• Explicit attention to the lived experience of a diverse membership, in particular from the groups of focus and related intersecting identities.</li> <li>• Full accessibility to people with disabilities.</li> <li>• Concurrent availability in both English and French.</li> <li>• Access to supports and/or translation of critically important information for members who are ‘linguistically different’.</li> <li>• Use of plain language.</li> </ul> <p>The checklist should be developed to be user-friendly and distributed to all individuals directly involved in communicating with members (e.g., local executives,</p>



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		<p>communications officers, <i>InSolidarity</i> and other newsletter editors, and sector/divisional/regional groups). On an annual basis, each group should review their experience with the checklist and provide any observations to the Equity Unit, for knowledge sharing across the union.</p>
<p>28.</p>	<p>Strengthen the communications infrastructure to support the work of the Equity Committees and Caucuses.</p>	<p><i>"Be visible"</i>: Immediately review and improve the access to information about the Equity Committees and Caucuses on the OPSEU/SEFPO website. In support of this, require each Committee/Caucus to provide updated information about their activities and impact they have had, suitable for a wide range of members. Find other opportunities to raise the visibility of the Committees/Caucuses, such as distributing information with membership forms (we note that this is in progress<sup>4</sup>) and/or in Convention delegates' kits.</p> <p><i>"Listen"</i>: Develop a process for members to communicate back to the Equity Committees and Caucuses. This could be, for example, as simple as a designated email address. Currently the contact lists, when one is provided at all (for example, we could not locate a contact list for the Provincial Women's Committee), are organized by Region. The census survey process revealed that about one-third (32%) of the respondents (who are admittedly more likely to be engaged and well-informed than the non-respondents) did not know their region number. This can create a barrier, or at minimum have a 'chilling effect' for members who might want to reach out to a member of the provincial Equity Committees/Caucuses.</p> <p><i>"Engage"</i>: HQ Communications unit should collaborate with the Committees/Caucuses to develop and implement a sign-up process for interested members to indicate an interest in being informed about, or engaged in, the work of one or more of the Committees/Caucuses. This should at minimum include "send" options such as an email mailing list, 'follow us' on social media, or a news feed from the website.</p>
<p>29.</p>	<p>Enhance the ability of locals to reach out to members from the groups of focus and to communicate about equity in an effective way. With a growing membership and a desire to engage more members more actively, there is a compelling opportunity to leverage 'grass-roots' connections and optimize the day-to-day union experience of members through their interactions with their locals.</p>	<p>Review, update and build upon the information provided to Stewards and Local Presidents regarding diversity and inclusion. The Equity, Communications and Education Units could collaborate with the Equity Committees and Caucuses to create and implement a three-year strategic action plan that would reinstate the <i>Building Local Capacity (BLC) Project</i> or a similar initiative with a dedicated focus on diversity, equity and inclusion for engaging a wider spectrum of members in activism, particularly from the groups of focus. The plan should require OPSEU/SEFPO to intentionally adopt fresher messaging and address current issues (e.g., anti-black racism, anti-colonialism, Islamophobia, inclusiveness, etc.) and use a range of innovative vehicles (e.g., podcasts, mentoring, online tools, virtual townhalls, remote learning, etc.). Develop and</p>

#	Recommendation	Suggested Approach
		implement impact measures to track success and learn from ongoing experience. Informed by a proper needs assessment, the plan could be completed by the end of 2021 for implementation through 2022-2024.
30.	Adjust communications methods and messages to reflect the interests and expectations of new and growing categories of OPSEU/SEFPO members, including those from the groups of focus.	The Communications Unit should undertake a review of external research, as well as internal pulse-taking, to create an explicit and clear framework to guide communications with new and emerging membership populations. This should address many of the issues identified above, including for example an ability for members to customize an information/news feed; communication vehicles that meet a range of needs; guidelines for language/terminology and an immediate effort to refresh materials to eliminate outdated/offensive terms <sup>5</sup> ; messaging that appeals to groups such as youth, women and newcomers who might be uncomfortable with an emphasis on aggressive and confrontational positions. An example to leverage is the information provided by NUPGE on communicating with millennials. The intent of these changes would be to foster a feeling of 'belonging', particularly among those members who have been less engaged to date – a feeling that the union understands their perspective and that they 'matter'. Build in a feedback and measurement process to monitor results and drive continuous improvement.
<b>Intended result</b>	<i>To increase equity in campaigns and bargaining processes, so they uncover and address issues of importance to all members.</i>	
31.	Solidify and extend the equity-related links between campaign topics and the diverse lived experiences and concerns of members, stakeholders and communities.	Embed in the <i>Policy Manual</i> a campaign development process with an explicit focus on perspectives of people with a range of identities and, particularly, intersections. This will likely involve: <ul style="list-style-type: none"> <li>• Ongoing, robust support for research support from OPSEU/SEFPO headquarters to disaggregate the issue's impacts on the groups of focus.</li> <li>• Explicit role for the Equity Committees and Caucuses to provide input.</li> <li>• Communications messaging that addresses core narratives and life experiences of each of the groups of focus.</li> <li>• Leveraging the content from the equity-related training programs, and integrating new messaging from campaigns into materials for training, workshops and locals.</li> </ul>

#	Recommendation	Suggested Approach
32.	Strengthen the accountability and ability of local bargaining teams to be knowledgeable about, and to implement, equity-related negotiating demands identified by Equity Committees/Caucuses, OPSEU/SEFPO HQ, Regions, and Divisions.	<p>Embed a commitment in the <i>Policy Manual</i> that local bargaining teams are responsible for considering diversity, equity and inclusion issues throughout the bargaining cycle. Ensure that equity-related education is provided to the local committee members, as well as their alternates, in advance of each round of collective bargaining; this could take the form of printed resources, webinars, training sessions, coaching, etc. Require staff reps to monitor the extent to which the local team has been advised of equity-related demands and report (at a high level) the team’s perspectives and the negotiating outcomes back to the original source of the demand.</p> <p>As a key support to the local bargaining teams, the Staff Rep must be a highly skilled equity guide and coach. Consider amending the job description of Staff Representative to strengthen the requirements for equity-related tasks, knowledge and competencies. For example, add equity-related language to the Major Tasks section; add a specific knowledge item regarding potential workplace barriers faced by equity-seeking groups; increase the “Valuing Diversity” competency from a Level 2 requirement to at least Level 3 or 4; increase the “Developing Others” competency from a Level 2 requirement to a Level 3 to reflect the complexity of proactively encouraging the development of members on the bargaining teams and from the groups of focus. Consider revising the title of the competency from “Valuing Diversity” to something that is impact-focused and action-oriented like “Fostering Equity”.</p>
33.	Be explicit in an attempt to diversify the membership of the negotiating teams at all levels.	<p>Require locals and central groups to take action to have a diverse group of candidates being presented for election to negotiating teams. This could be similar to local bylaws that address the representation of various job functions within the teams. Require the groups to record the demographic make-up of their sets of candidates and the elected team members and alternates, and review progress or trends at the start of each bargaining cycle. Prior to the election of bargaining team members, an explicit message should be distributed to all members eligible to vote, emphasizing the value of having a diverse team; the emphasis should be on the demonstrated benefits of team diversity on problem-solving, decision-making, and so on. Locals and central groups should create an explicit plan in each round, identifying engagement opportunities for a wider group of members from the groups of focus as well as part-time or precarious workers; opportunities could include inviting them to attend the training; seeking their input during the process, perhaps as advocates and/or by having them brief the team members; and actively involving the alternates to the maximum extent possible.</p>

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		The Equity Unit and staff reps could collaborate on developing strategies, tip sheets, etc. in this regard.
34.	Provide tools to make it easier for local bargaining teams to understand and attend to the interests of the full diversity of their members.	Provide access to a basic demographic questionnaire that locals could use to understand the make-up of their membership. Without compromising the principle of democratic demand-setting, equip locals with tools (questionnaires, discussion processes, online consultation vehicles, etc.) that would enable them to surface issues that are important to an identified minority or group of focus within their membership.
<b>Intended result</b>		<i>To evolve the culture of leadership and the union to enhance diverse members' sense of 'belonging'.</i>
35.	Address any unwelcoming aspects of the environment and culture at Convention and other events. Re-commit to creating a 'safe space' for OPSEU/SEFPO members.	<p>Build on the Statement of Respect by polling members at a sample of events in 2021 and 2022 to see whether they have felt that it was a 'safe space'. Explicitly expand the focus beyond 'harassment and discrimination' to include a focus on 'unwelcoming words, actions or behaviours' as in the Statement. Ask about micro-aggressions or micro-inequities not just personally experienced but also observed, as well as a general sense of the climate. This work should be led by a headquarters group accountable for meetings/events (not the Equity Unit) to clearly demonstrate that this is core to the union's business.</p> <p>Because issues can often be related to alcohol and inappropriate behaviours, follow up on the policy statement recently approved by the Executive to require that events with alcohol be "conducted in a reasonable and responsible manner that protects the safety of all people involved." Poll all meeting organizers in 2021 to find out what, if anything, they have done differently to respect this commitment and what impact it had. This will build in accountability and permit sharing of best practices that are uncovered.</p> <p>Expand the wording of the Harassment and Discrimination Prevention Policy (HDPP) to explicitly address the issue of creating a poisoned environment, single-occurrence events, or behaviour that is not directed at a particular individual.<sup>6</sup></p>
36.	OPSEU/SEFPO should commit to taking the next step in its pre-eminent position in diversity, equity and inclusion among Canadian labour organizations. It should build on its effective policies and practices to foster a first-in-class leadership population that consistently reflects diverse approaches, acts as role	<p>Undertake an organization-wide initiative to develop and gradually implement an <i>OPSEU/SEFPO Inclusive Leadership Model</i> (working title). [Note that this will build upon and operationalize the recommendation from the first SMP regarding the development of alternative and less confrontational styles of leadership.]</p> <p>The basic steps would be:</p> <ul style="list-style-type: none"> <li>• Develop the model through building on the SMP results; drawing insights from well-respected external research and frameworks for inclusive leadership<sup>7</sup>; and</li> </ul>

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	models and influencers, and delivers a fully inclusive experience for members.	consulting broadly with members and current elected/appointed leaders at all OPSEU/SEFPO levels. <ul style="list-style-type: none"> <li>• Define specific behaviours and characteristics relevant to each level.</li> <li>• Create and deliver learning materials and pathways to support leaders and aspiring leaders in acquiring and demonstrating the required skills and behaviours.</li> <li>• Implement a monitoring and evaluation process for continuous improvement at an individual and sector/divisional/regional/provincial levels.</li> </ul>
<b>Intended result</b>		<i>To remove barriers in the opportunities for members to be involved in the union's activities.</i>
37.	Focus on building members' gradual involvement in ways that are more convenient and 'bite-size'. Consistent with the guidance in the <i>New Presidents Toolkit</i> , encourage local executives to approach members with specific 'asks'.	<p><i>Provide resources.</i> Identify a small number of locals or activists who have a track record of success in engaging their membership and task them with developing tip sheets and/or online resources based on their successful strategies. Keep this fresh by offering regular podcasts of 5 to 10 minutes with 'just-in-time' suggestions for activities that members could undertake on a particularly current or challenging issue.</p> <p><i>Provide recognition.</i> For example, consider the use of Open Digital Badges (see Recommendation #14) to acknowledge the skills and experience gained by participating in a given activity. Documented skills could be useful for people seeking more advanced roles. This approach could be piloted in one sector and then expanded if successful.</p> <p>Have locals identify someone who could track numbers of members engaged in various initiatives and lead an annual review of which strategies were most successful.</p>
38.	Improve communications and <u>outreach</u> to encourage members from the groups of focus to take on responsibilities that they might otherwise consider to be a 'stretch'.	Emphasize in president and steward training and resource materials that it is their responsibility to encourage a diversity of members to be involved; emphasize the benefit to OPSEU/SEFPO and to equity and social causes. Identify outreach activists from the groups of focus and provide them with the resources listed above and additional training if needed.
39.	Explore job-sharing and other innovative approaches to minimizing the time requirements for an individual member (e.g., steward, other exec roles).	Identify six to ten local executives who might be interested in participating in a pilot of job-sharing, rotational duties, or other innovations. With their involvement, determine what practices would meet their needs. Simultaneously identify provisions in the <i>Policy Manual</i> that might need to be changed and what safeguards put in place. (Many good resources are available with learnings and tips from workplaces that use job sharing very successfully.) This could be of interest to members in any of the groups of focus.

#	Recommendation	Suggested Approach
<b>Intended result</b>	<i>To be intentional in providing access and removing barriers to learning and development opportunities for members of the 'groups of focus'.</i>	
<b>40.</b>	Implement ongoing metrics to monitor the participation of the groups of focus within a range of OPSEU/SEFPO training opportunities. Collect demographic data on participation and satisfaction with training opportunities. Analyze it on a regular basis to identify trends or potential barriers.	Encourage local memberships to be more aggressive in recruiting the members from equity-seeking groups to be involved in education and development. Require regions (and eventually cascading to locals) to collect, analyze and report demographic data on member application, participation and satisfaction with training opportunities. Headquarters staff should collate the information and analyze it on a regular basis to identify trends or potential barriers.
<b>41.</b>	Conduct an equity audit of the educational programs and events offered at the provincial, regional and eventually the local level.	Task OPSEU/SEFPO headquarters with a responsibility to review a target number of courses/programs each year on a rotational basis. Paying particular attention to unintended, systemic and subtle barriers affecting the groups of focus, the review should include the following: <ul style="list-style-type: none"> <li>• Explore any barriers that hinder designated group members from building the experience and capacity to satisfy the requirements for attending educationals.</li> <li>• Audit the process that was used to inform members about the educational opportunities and the decision process for approvals.</li> <li>• Review training content and delivery mechanisms through a diversity, equity and inclusion lens. Ensure that best practices are embedded into the design of educationals.</li> <li>• Review the process of training and assigning facilitator(s) to evaluate the opportunity provided to members from the groups of focus.</li> </ul>
<b>42.</b>	Reconsider aspects of scheduling and delivering educationals to better reflect the needs of young workers and those with casual positions or shift work, many of whom are members of BPS, now the majority of OPSEU/SEFPO membership.	Implement a pilot program in 2021 to offer a course in an alternative format or scheduling. Select one or two courses that are in high demand and/or that would be most helpful to members of groups of focus in the BPS who are not yet active in the union (an example might be Public Speaking).
<b>43.</b>	Expand the educational offerings that are delivered through alternative and effective methodologies that would minimize costs, travel, or lost work time and will better meet	Create a multi-year target to shift the proportion of training delivery to have a higher ratio of learning accomplished through approaches such as: remote/virtual delivery; webinars; modular or hybrid learning models; e-learning; peer group learning/coaching;

#	Recommendation	Suggested Approach
	the needs of women, Indigenous peoples, workers with disabilities, young workers, those on precarious jobs, members in northern/rural/remote regions, etc.	action learning; etc. Pilot two new approaches each year. Monitor participation as well as outcomes.
44.	Implement a formalized process for strategic succession management to ensure that the union’s “talent pipeline” is diverse and sufficient to meet its upcoming needs. Provide education, encouragement and support for activists in the groups of focus who have leadership aspirations.	Identify core leadership skills and behavioural competencies that will be important to OPSEU/SEFPO’s solidarity and impact in the coming five to ten years, recognizing shifting expectations of the membership and society. Conduct a scan of the current and upcoming leadership populations to identify key gaps in experiences and competencies. Create a set of development pathways and steps that individuals can undertake, as well as a cadre of mentors who can support them. Develop a training program to support mentoring partnerships. Review the uptake, the demographics and competencies of participating members, and their development progress on an annual basis.
<b>Intended result</b>	<i>To ensure an inclusive election process that leads to demonstrably equitable outcomes.</i>	
45.	Consider the equity-related implications (risks and opportunities) of a shift to three-year elected terms, including an increased number of Alternates at Regional and Provincial levels.	Immediately engage the Executive Board in a discussion of the equity-related implications of three-year elected terms. A robust discussion will build awareness of the issues and will help to ensure an effective decision with a positive implementation plan. Any resolution being put forward to change the election cycle should explicitly address equity impacts and how those will be monitored if/when the resolution is adopted and the change is made. This will signal the Board’s commitment to applying a diversity, equity and inclusion lens to all decisions within the union’s operations.
46.	Consider increasing the requirements for quorum at elections, to help ensure a broader representation of the membership.	Strike a task force to examine the feasibility and determine the best approach for a phased-in increase in the quorum requirement. Options to consider would be: <ul style="list-style-type: none"> <li>• Consider implementing a higher quorum requirement when new election procedures are put in place with options such as electronic voting, vote by mail, voting kiosks, drop-in voting sessions, etc.</li> <li>• Pilot the change in certain sectors where there is keen interest in increasing participation.</li> <li>• Start by leaving the current minimum requirements in place, but establish ‘stretch goals’ for the percentage of members engaged in the election.</li> <li>• Once greater participation is achieved, embed the new quorum numbers in policy, to sustain the focus on ‘getting out the vote’.</li> </ul>

#	Recommendation	Suggested Approach
47.	Modernize election processes to enable remote participation.	<p>Use the pandemic experience as an opportunity to trial, learn and optimize alternative election methods that can be used on an ongoing basis for allowing greater inclusion and minimizing barriers to participation by all members, particularly from the groups of focus.</p> <ul style="list-style-type: none"> <li>• <i>Voting:</i> Review the experiences of recent election processes that involved voting methods other than in-person meetings. Simultaneously review the experiences of other unions that have used electronic voting methods during the pandemic. Consult with the Equity Committees/Caucuses about potential impact on the groups of focus. If necessary, pilot new approaches and evaluate their success. Create and implement new approved methods that would not require Presidential approval in certain identified situations.</li> <li>• <i>Candidate presentations:</i> Review recent OPSEU/SEFPO experiences with online technologies for remote meetings, for capturing video or written statements by members (potential candidates), and for engaging in online (possibly asynchronous) Q&amp;A. Simultaneously review the experiences of other unions that may have used online meeting methods during the pandemic. Consult with the Equity Committees/Caucuses about potential impact on the groups of focus. Create and implement new approved methods that would not require Presidential approval for each use.</li> </ul>
48.	Introduce policies to provide for equitable opportunities for election success.	<p>Our review lacks the specialized understanding of OPSEU/SEFPO election dynamics that would lead to specific suggestions. We recommend that OPSEU/SEFPO establish a task force of Equity Committee/Caucus representatives and others to identify and prioritize appropriate changes that would help to 'level the playing field' for candidates. These might include, for example:</p> <ul style="list-style-type: none"> <li>• Provide greater support to candidates (such as paid time off, 'own time' compensation, expense coverage, childcare) to have more equitable access to debates, Q&amp;A sessions, etc.</li> <li>• Have the union's Communications Unit create capacity-building resources (e.g., educational, tip sheets, sample tools, templates) to support locals/sectors in using social media, the OPSEU/SEFPO or local websites, video libraries, short podcasts, etc. to help raise the visibility of new candidates seeking election.</li> <li>• Place upper limits on candidate spending, and audit compliance.</li> </ul>



#	Recommendation	Suggested Approach
49.	Implement a measurement process to monitor and report on the demographic representation among voting members, delegates, candidates and elected members in the election process.	Ongoing data collection at various points in the election process can be very helpful. This should include not only demographics of those who participate, but also attitudinal data broken down by demographic characteristics. A working committee should create a basic questionnaire that would be distributed during election processes at all levels. Locals should report the self-identified demographics of the candidates (successful and unsuccessful). An administrative unit at headquarters could compile the results for reporting to the Board and Convention.

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1. For example, note that individuals who identify as Chinese or South Asian are significantly underrepresented in the OPSEU membership census compared to the Ontario population. A search of Statistics Canada data can identify occupational categories and/or work sectors where people with these backgrounds are commonly employed.
  2. It is strongly suggested that current legal advice be sought prior to undertaking this action.
  3. OPSEU *Policy Manual* (2018), 9.1-3.
  4. Executive Board minutes, September 25-26, 2019.
  5. For example, we note that the language and definitions in the *Policy Manual* are often outdated and now considered not fully appropriate.
  6. See, for example, the OHRC resources related to harassment / poisoned environment such as <http://www.ohrc.on.ca/en/policy-discrimination-against-older-people-because-age/8-harassmentpoisoned-environment>.
  7. There are many good resources available, such as the TRIEC Inclusive Workplace Competencies, Deloitte’s Six Traits Framework, Harvard Business Review research, the IDI assessment, etc.



## ABOUT GRAYBRIDGE MALKAM

For almost 30 years, Graybridge Malkam has helped organizations and individuals in Canada and around the world enhance their potential and improve their performance. We are a leading provider of training, research and consulting services in equity diversity, inclusion (EDI), intercultural competency, and language acquisition. Graybridge Malkam supports organizations across all sectors in their journey to achieve a transformative culture and address human resource and workplace challenges.

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