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## ETFO - Toronto OT Local, *Engagement Report*

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May 8, 2024

### Background

Liberty Square Consulting was connected to the ETFO - Toronto OT Local released officers in response to the Local Executive Committee's desire for training and development in diversity, equity, and inclusion (DEI).

After an initial call with the team, we suggested that the core issue was not DEI, but teamwork. The released officers agreed to a half-day group leadership session, with an emphasis on DEI, preceded by 1-on-1 conversations with each team member. After a few false starts, the leadership session was run, in a 4-hour and a 2-hour block.

### Released Officers' dynamics

The released officers' dynamics emerged quickly, including:

- A desire and keen appetite to spend more time diving into, and collaborating on, some of the core issues affecting membership
- Broken relationships, including
  - An unwillingness to repair those relationships
  - Hurt feeling
  - Pressure to take sides
  - Accusations of physical violence between members
  - Mental health consequences and stress due to the conflict
  - Suspicion that individual members were trying to manipulate the leadership engagement to support their personal narratives
  - Growing reluctance to collaborate
  - Avoidance of each other



- A general lack of professionalism in dealing with each other
  - Direct and passive aggressive personal attacks are a common occurrence, and shut down professional and personal conversations
- Risk that issues might burst into more public view via human rights complaints

#### Other related parties

During the engagement, interactions with other related parties revealed frustration with the Executive Committee within the Provincial office. The causes of this frustration include:

- Provincial constantly being engaged by ‘warring’ parties within the Executive Committee
- General feeling within Provincial that the Local released officers are more focused on engaging in their interpersonal conflicts than on providing better service to their members

#### Poor structure fueling interpersonal issues

It became clear through observation and from conversation with the released officers that the Local is not optimally structured to enable effective collaboration, and best serve its membership. Key areas of ineffective structure include:

- Purpose and strategic priorities
  - Tactical, not strategic. The released officers’ mandate is task-based, focused on day-to-day, tactical objectives in areas like accounting and answering member calls. There appears to be no formal strategic priorities intended to advance the broad interest of membership.



- Separate mandates. Released officers are voted in based on separate mandates, with no well-defined shared goals and no responsibility or accountability to collaborate effectively.
- Roles and responsibilities
  - There is not a fulsome articulation of each released officers' roles and responsibilities. This can also lead to a disconnect in understanding the time and financial resources required to perform each job.
- Accountability
  - Governance. There is not a well-understood and communicated governance model that articulates the lines of authority, communication and accountability between the Local Executive Committee, the president, and the other released officers. There also appears to be an unofficial reporting line to Provincial, which may dilute the released officer's sense of direct accountability to the Local Executive Committee and to the membership.
  - Elections. The voting process limits the ability of most of the membership to vote for their representatives. The strong and visible impression is that the process supports a historical power base and restricts the voice and power of members from historically marginalized groups, including lower income members.
- Professional conduct
  - Norms of behaviors. There are no established norms of behaviors that articulate how released officers should treat each other, collaborate, and hold each other accountable. There is a lack of common agreement on what 'professionalism' should look like when dealing with colleagues.
  - Expectation. There is not a well-defined expectation that released officers treat each other in a professional manner.
  - Reporting. There does not appear to be a timely and sufficient reporting mechanism in place for the Local Executive Committee and membership to hold



the released officers responsible for effective service, the advancement of strategic goals, and for professional conduct when engaging colleagues.

- Grievance and conflict resolution. The Local has no effective, internal, formal, safe avenue for difficult conversation and reconciliation.
- Structure
  - Facilities. The office is not considered an inviting space for collaboration. Also, the team questions whether it has the required level of accessibility.
  - Priorities. Time and space are not set aside to collaborate on strategic issues.
  - Released officer terms. Released officers feel that the Local Executive terms are too short to sufficiently acclimate, be informed, and achieve a level of interconnectedness than will enable high performance.

#### Issues identified that require strategic collaboration

- Inequitable access and power for members. There is a clear and significant gap in the ability of the Local members to equitably access, and exercise power within, the Local. The level of access and power varies based on the diverse attributes (ethno-cultural, socio-economic, etc.) of each member of the Local. The released officers flagged this issue as a high priority that requires its strategic collaboration. Key areas of inequitable access and power include:
  - Ability to access the day-to-day services provided by the Executive Committee
  - Ability to exercise voting rights during the Local Executive Committee elections
  - Access to membership reports, updates, and other communications
  - Access to effective onboarding and orientation when elected to the Local Executive



### Intercultural competency

There is not a shared understanding amongst the released officers regarding:

- Equity. Opinions differ on whether different constituencies within the membership have different levels of access to, and power within, the union.
- Deep diversity. There is not a shared understanding on the types of diversity, beyond gender and ethno-culture, that may impact a member's power within, and access to, the union (i.e. social economics, accent and language, caregiver status, neurodiversity).
- Inclusion. The climate within the released officers is not conducive to engaging in the 'uncomfortable' conversations around diversity, equity, and inclusion that are essential to effectively serve the Local's membership.

### Recommendations

An initial list of recommendation to improve released officers' impact and well-being includes:

- Orientation retreat. Conduct a mandatory, one-day retreat for all Local Executive Team members at the start of each Executive Committee term.
- Purpose. Re-establish the purpose statement – the broader impact the organization wants to make – at the leadership retreat.
- Governance. Clarify, and communicate the governance model, including the lines of authority, accountability, and communication between the Local, the Local Executive Committee, the Local president, and the released officers. Clarify the role of Provincial. Provide a governance refresher to the Local Executive members at the retreat.
- Strategic objectives. Establish 3-5 strategic objectives for each Executive Committee term. Solicit five suggestions from the departing Executive Committee. Provide the suggestions to membership and Executive Committee candidates before elections. Develop metrics, measurement and reporting for each objective. At the leadership retreat identify key tasks under each objective.



- Reporting. Established an effective reporting process that flows from the released officers to the Local Executive Committee to the membership at large. Key reporting categories may include: progress on the strategic objectives, statistics on daily operational tasks (i.e. member calls, accounting), staff performance, and the health of personal relationships within the Executive.
- Equity and Diversity. Provide the Local Executive Committee with an equity, diversity, and intercultural competency refresher at the Local Executive Committee retreat.
- Roles and responsibilities. In conjunction with the departing Executive Committee, fully articulate the roles and responsibilities of each released officer position, including:
  - Daily tasks
  - Areas of required collaboration
  - Local Executive Committee meeting attendance and reporting
  - Areas of support that must be provided to other released officers
  - Input, review, and approval required from other released officers
  - Input, review, and approval to be provided to other released officers
  - Required relationship-building activities focused on the cohesiveness of the Local Executive Committee
- Norms of behavior. Collaboratively develop a Workgroup Charter at the Local Executive Committee retreat to codify how the released officers will treat each other. This charter should include, amongst other items:
  - Collaboration and meeting protocols
  - Conflict resolution process
  - Respectful language
  - Remote/work-from-home expectations
- Safe Outlets for Communication. Develop an internal grievance process for the Local.
- Onboarding. Standardized an onboarding process for all new released officers.