

EXECUTIVE SUMMARY

On May 24, 2016 the Board of Trustees for the Palliser School Division, in response to various allegations by the public regarding the Palliser School Division, retained the services of Dr. Kelly Williams-Whitt and Dr. Terry Weninger to conduct an organizational review of the school division. The work of the panel began on May 25th, 2016 and concluded on October 31, 2016.

The key components of the review were: a) organizational climate, culture and leadership; b) governance practices; c) accountability to stakeholders; and d) internal and external communication practices.

The panel has attempted to prepare a systematic, objective and thoughtful analysis of the Palliser School Division. The panel gathered information from four different sources:

1. A survey of the psychological safety climate within the Palliser School Division.
2. Semi-structured interviews with current employee, former employees, trustees and other stakeholders.
3. Documentary submissions from stakeholders.
4. Data and documents requested from Palliser.

There was reasonably consistent consensus across stakeholder groups and data sources that indicate Palliser has some core strengths. These include: innovation, vision, financial accountability, using data to measure educational quality, creating a safe and caring environment for students, and using a needs-based approach to budgeting. The data also indicate that Palliser has some key challenges, which include:

- a culture and climate that is not psychologically healthy for employees,
- perceived conflicts of interest in hiring and supervision,
- perceptions of ineffective or unfair performance management,
- perceptions of inappropriate employee monitoring,
- ineffective complaint handling and investigation,
- perceptions of micromanagement,
- stifled internal communications,
- ineffective board operations and governance.

A summary of the 21 recommendations resulting from the review are provided below.

1. Palliser School Division must create a comprehensive and systematic plan to address the culture of aggression and fear that is being experienced by many (not all) employees. Organizational leaders must be committed to this process and it must be made a priority. The plan will require a global and sustained effort that assigns accountability and addresses the most common mechanisms of culture change.
2. Palliser School Division should make a commitment to comply with the CSA National Standard of Canada for Psychological Health and Safety in the Workplace, within two years.

3. The Palliser Board of Trustees must establish itself in reality and in perception as the leader of the School District by evaluating and clarifying the roles and relationship of the Board and the Superintendent.
4. The Palliser Board of Trustees must take action to address the current lack of trust among Board members and between the Board and senior administrators. We therefore recommend that the Board engage the services of a qualified and experienced mediator to help the parties identify specific actions and behaviors that will enable them to function effectively. We also recommend that Trustees and senior leaders in Palliser receive training in conflict management so they can learn how to manage interpersonal conflict and prevent personal attacks.
5. The Palliser Board of Trustees must take ownership of the Superintendent evaluation process. They need to evaluate the current approach, the criteria and measures they are using, as well as the methods for collecting data about the Superintendent's performance. This should include a systematic process for following up on areas identified as requiring improvement.
6. To manage immediate concerns with procedural fairness, the Palliser Board of Trustees should establish an office of an independent ombudsperson for complaint handling. The ombudsperson must have the authority to accept internal and external stakeholder complaints, investigate, resolve where possible, and make recommendations to Palliser leadership for action where appropriate. The ombuds-office must also have authority to investigate and resolve allegations of retaliation for complaint filing. The ombudsperson should provide regular summary reports to the Board. The ombudsperson role should be reviewed annually to measure success and assess its value as an on-going structure.
7. Over time, as trust within the district improves, we recommend that Palliser School Division develop an internal, transparent and procedurally fair complaint and conflict resolution process. The process must ensure that Palliser responds in a timely and appropriate manner when challenging interpersonal issues arise from the public or from internal stakeholders.
8. The Palliser School Division should create a system to facilitate bottom-up communication and feedback within the organization. Furthermore, the communications staff should review, with employee input, what types of information are most useful and relevant so they can tailor central office communications to meet the needs of the audience.
9. Senior leadership at Palliser should provide school administrators with an agenda and list of questions/topics in advance of school goals meetings, in order to ensure school administrators have the opportunity to appropriately prepare for the meetings.
10. Palliser School Division should improve its human resources record keeping and data analysis, particularly with respect to turnover, absenteeism, employee health and psychological safety.
11. To ensure Palliser is able to provide appropriate rationale for its hiring decisions, and to support compliance with human rights law, Palliser School Division should:

- a. create job profiles with minimum requirements for knowledge, skills, abilities and other attributes;
 - b. specify clearly how hiring committees will be constituted for each position;
 - c. create systematic procedures for the recruitment and selection of staff, including rubrics for evaluation of applicants;
 - d. maintain records of the hiring process, including scoring and rationale for the selection made; and
 - e. the board should be made aware when there is a potential for conflict of interest in the hiring process.
12. Palliser School Division should develop a progressive discipline policy for all employees that complies with existing collective agreements and relevant legislation. The policy should involve a series of progressively more serious disciplinary steps to ensure Palliser's response is proportionate to the nature and degree of misconduct.
 13. Palliser School Division should develop an off-duty conduct policy that applies to all employees that explains when off-duty conduct will become a work-related matter and subject to discipline.
 14. Palliser School Division should develop a more transparent and thorough electronic monitoring policy. The policy should ensure Palliser is taking the least invasive approach possible. Employees should be reminded of the monitoring policy at least annually.
 15. Palliser School Division should develop a policy that clarifies when the purchase of alcohol is and is not permitted, and when it will or will not be reimbursed. This policy should be made available on the Palliser website to support transparency.
 16. Palliser School Division should develop a policy around personal use of Palliser vehicles. We would also encourage Palliser to re-evaluate the cost-effectiveness of the vehicle purchase policy to ensure it is meeting the cost-saving objectives it was intended to meet. The results of this evaluation should be made publicly available so that Palliser's response to this issue is transparent.
 17. The Palliser Board of Trustees must revise its approach to developing Board meeting agendas to enable participation of all Trustees, as well as the Chair and Superintendent. The agenda and supporting documents should be distributed at least one full week in advance of the meeting. A specific process should be developed for the public to add items to the Board agenda. The public should be made aware of the process and requirements for having an item added.
 18. It is recommended that Palliser Board of Trustee meeting time be set aside for Board professional development. This professional development agenda should be developed by the Board members and be in addition to services provided by the Provincial associations or government. A policy should be put in place requiring Board members to participate in a certain number of professional development activities on an annual basis. This should be included in annual Board evaluations.
 19. In order to better support Board operations, we would recommend that the Palliser Board of Trustees be provided with independent administrative support.

20. The Palliser Board of Trustees must revisit the strategic plan to focus on future needs of the district. Managing diversity in a growing organization is a challenge that will be difficult to balance. Palliser has chosen centralization as the primary mechanism for this to occur. However, there appear to be some unintended consequences related to this decision. Palliser should therefore revisit this issue with an eye to clarifying roles and responsibilities, particularly for school administrators. Decision-making authority and control systems should be reviewed. The goal should be to support diversity, and increase the opportunities for input from employees throughout the organization, while maintaining economic efficiencies.
21. The Palliser School Division should develop a communication plan to keep the public, Palliser employees and other stakeholders apprised of the recommendations they have accepted, as well as their progress in implementing the recommendations.

Ultimately, responsibility for these recommendations rests with the Board of Trustees to direct and monitor their implementation. We would also like to recognize that this report makes it appear that Palliser School Division is not functioning well in any area. This is not true, there is much that is positive of which the district can be proud. We hope that these successes and our recommendations form the foundation for a stronger organization in the future.