2016 Organizational Review Report

Palliser School Division

Submitted to the Board of Trustees on November 3, 2016

By

Dr. Terry Weninger

&

Dr. Kelly Williams-Whitt

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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 behaviours 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 to 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.

INTRODUCTION

On May 24, 2016 the Board of Trustees for 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 curriculum vitae of the panel members are included in Appendix A.

The terms of reference for the review were as follows:

Terms of Reference

Background

The Palliser Board of Trustees has authorized by resolution the performance of an Organizational Review, in response to various allegations by the public regarding the Palliser School Division and Superintendent. The Organizational Review shall be conducted by an independent Review Panel.

Purpose
The Review Panel will conduct an organizational review of the Palliser School Division. The following are considered the key component categories of the organization review:
1. Organizational Climate, Culture and Leadership;
2. Governance Practices;
3. Accountability to Stakeholders; and
4. Internal and External Communication Practices.

Panel Membership
The Panel will be comprised of two individuals who shall work as a team to perform the Organizational Review.

The Panel is chosen to collectively address a multitude of skill sets including:
1. Investigative – The proven ability to conduct interviews with the intent of determining factual circumstances;
2. Human Resources Skills – A strong and demonstrated understanding of Human Resource Management,
3. Organizational Behaviour and Organizational related issues;
4. Organizational Leadership – Proven Experience and Demonstrated Organizational Leadership at a senior organizational level;
5. Background and experience in an Educational Environment; and Demonstrated ability to perform organizational reviews.

While it is understood that the Panel will not be created in a hierarchical manner, one Panel member will be chosen to act as the Coordinator of the Panel.

Key Elements of the Organizational Review:

1. The Review shall be conducted offsite from Palliser property and shall be independent of Palliser School Division in determining its findings;
2. The Review Panel shall be given unfettered access to interview any former or existing employees of the Palliser School Division;

3. Upon Selection of the Panel, the Panel shall meet and develop a formal joint proposal complete with individual budgets (one for each Panel Member) to perform the work. The Panel shall present such joint proposal to the Palliser Board of Trustees for approval of the budget;
4. Current employees shall be given protection from any workplace retribution resulting from their engaging in interviews with the Panel;
5. Panel Members will be able to demonstrate their objectivity by ensuring that they have not worked for the Palliser School Division presently or in the past; and
6. Panel members are to have full access to any relevant documents of Palliser School Division. While educational results and effectiveness are not a purpose of this review, the Panel shall be free to review and take note of existing documents, reviews and measures of Palliser School Division's educational effectiveness. The Panel shall also have access to legal counsel.

Timelines
The anticipated timelines of the organizational review shall be completed no later than October 31, 2016, or earlier if possible.

Approach

The work of the panel began on May 25th, 2016 and concluded on October 31, 2016. The following report details the methods utilized for the review, a summary of the information collected, analysis and recommendations for the consideration of the Board.

The panel has attempted to prepare a systematic, objective and thoughtful analysis of the Palliser School Division. The aim is to provide information that can be acted upon so that Palliser can continue to engage in the things it does well, and develop strategies to address areas that are problematic.

It is not the intention of the panel to make findings of fact with respect to particular allegations, or to lay blame for the challenges facing Palliser. ████████ Redaction - Section 17(1) of the *FOIP Act* ██ In order to prevent potential contamination of evidence in the professional conduct investigation, we have engaged in a broader analysis of the School Division in accordance with the terms of reference for the review. We identify genuine concerns where the evidence is sufficient to indicate that Palliser should make changes to address these concerns. We will propose recommendations to assist Palliser in managing problematic areas. However, it will be up to the Board of Trustees to determine the most effective way to move forward.

METHODS

In order to be as comprehensive as possible and to enable comparisons between different types and sources of data, the panel gathered information from four different sources:

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

A description of the rationale and method employed for each data source is provided below.

Survey

Since the climate and culture at Palliser is one of the key terms of reference for the panel, it was necessary to find a way to capture information from a broad range of employees in an efficient and effective manner. Employee perception surveys are leading indicators[1] and a well-accepted method used for this purpose. A number of different instruments are available and could have been used by the panel. However, we selected the Guarding Minds at Work Survey (GM@W)[2] for several reasons.

First, suggestions in the media that a "culture of fear" exists within the school division, indicated that it would be most relevant to assess psychological health and safety for employees across the division. Psychological health is the ability to think, feel and behave in a manner that enables effective performance at work, in our personal lives and in society at large. Psychological safety is the risk of injury to the psychological well-being of employees. Improving psychological safety, involves taking precautions to avert injury or danger to psychological health.

Second, there are a number of strong arguments for the importance of assessing psychological health and safety in any organization:

- The provision and maintenance of a psychologically safe workplace has been recognized as a duty of employers, similar to the duty to provide a physically safe workplace. Examples of conduct that may violate acceptable standards are bullying, harassment, discrimination, imposing unreasonable work demands and providing little employee control over workload or the pace of work. Assessing the psychological climate of a workplace, and acting on concerning results, is a way for employers to show they are duly diligent in protecting their employees from this type of workplace hazard.

- Compromised psychological safety has a range of negative organizational effects including higher disability costs, reductions in productivity due to absenteeism and presenteeism[3], higher

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[1] Leading indicators are predictors of safety that can inform safety policy and interventions. Lagging indicators measure safety outcomes such as disability rates or benefits costs.

[2] GM@W 2009: Samra, J., Gilbert, M., Shain, M., Bilsker, D.; GM@W 2012: Gilbert, M., Bilsker, D. Shain, M., Samra, J.

[3] Presenteeism is when workers are at work, but because of illness or other health conditions, are not functioning fully.

accident rates, and decreased morale resulting in elevated levels of conflict and associated grievances. Positive effects of a psychologically healthy and safe workplace include improved recruitment and retention, engagement and increased resilience for employees as well as the organization as a whole.

- Workplace stress arising from perceptions of bullying, discrimination, harassment or unmanageable workload is a significant predictor of work disability. Workplaces that provide a supportive environment can reduce the onset, severity, impact and duration of work disability.

The third reason we selected GM@W is because it is well-validated and comprehensive. The survey was developed by researchers at the Centre for Applied Research in Mental Health and Addiction (CARMHA) and has been psychometrically tested to ensure it is reliable and valid across a range of work contexts. It assesses 13 psychosocial factors that impact the employees' psychological responses to work and work conditions. The factors measured by GM@W are consistent with a large body of research on psychosocial risk factors, and are relevant across organizational types (public, private, large, small). The factors assessed by GM@W are:

1. Psychological support
2. Organizational culture
3. Clear leadership and expectations
4. Civility and respect
5. Psychological competencies and requirements
6. Growth and development
7. Recognition and reward
8. Involvement and influence
9. Workload management
10. Engagement
11. Balance
12. Psychological protection
13. Protection of physical safety

Fourth, we selected GM@W because it is available at no cost to employers and is housed on a secure GM@W website that prevents access to, or manipulation of, the raw data. The GM@W system provides reports and analyses that enable employers to compare results from year to year to assess the effectiveness of their efforts to change or improve any one (or all) of the factors. This means that the current survey can act as a baseline, and Palliser leadership will be able to arrange re-administration of the survey at timely intervals to assess trends. Employees can be assured that their individual responses cannot be traced and are therefore more likely to be forthcoming in their responses.

Finally, GM@W provides comparison data from a 2012 sample of 4,307 working Canadians across a nationally representative sample of industries and geographic regions. This means the Palliser can see how it compares to other organizations in Canada.

The introduction to and questions in the survey are provided in APPENDIX B. Employees are asked to respond to a series of questions evaluating their perceptions of each of the 13 psychosocial factors.

Employees are asked to rate their agreement with each statement on a four point scale ranging from strongly agree to strongly disagree.

The survey link was distributed to Palliser employees via the Palliser email list on June 30, 2016. The email request was as follows:

> Dear Palliser Staff Member,
>
> As you know, we (Dr. Kelly Williams-Whitt and Dr. Terry Weninger) are in the process of conducting an organizational review of the Palliser School Division. Our aim is to better understand any concerning issues that might be going on in your workplace. A critical part of this process is obtaining your input about your experiences at work. One of the ways we will do this is through an online survey called Guarding Minds at Work (GM@W). Your input on this survey is extremely important in order guide us in the next stages of our review.
>
> Although we are using the Palliser School Division email to send you the link to the survey, it is important that you know this survey is being **administered by us and NOT the school division**. The responses are stored on a separate and secure server.
>
> Furthermore, you should know that your answers are **anonymous**. The original data can only be viewed by us (Dr. Weninger and Dr. Williams-Whitt), and there is no way for us to link responses to any individual within your organization.
>
> Participation is voluntary – but we encourage you to participate so that we can obtain a thorough and balanced perspective. The more people who fill out the survey, the better our information. The survey will only take about 15 minutes of your time.
>
> We value your participation, and know this is a busy time of year. However, we ask that you please complete the survey on or before **June 30, 2016**.
>
> All of the information you need to complete the GM@W Online Survey is found by clicking on the link below. Please read the instructions carefully before you start: http://www.guardingmindsatwork.ca/eng/info/survey/kjm90knm
>
> If you are unable to complete the survey online, please email us at Palliserreviewpanel@gmail.com and a paper copy will be made available to you, and information provided to a location with a locked box (similar to a ballot box) where the completed surveys can be deposited.
>
> If you have any questions about the GM@W Online Survey, please contact us at Palliserreviewpanel@gmail.com.

After the survey was distributed, a number of employees expressed concern that the survey may not provide the panel members the information they required to identify the real problems with the division, which they perceived to be related to the organization leadership in Palliser's central office. A follow-up email was sent in order to clarify the purpose of the survey, encourage participation, and to indicate that the panel members were collecting data from many sources in addition to the survey, and would be paying particular attention to leadership at Palliser (per the terms of reference outlined above).

Six employees also contacted us to confirm that their participation would be anonymous and to request paper versions of the survey, which were supplied to them along with a return envelope. These responses were entered into the GM@W database by the panel before the data was analyzed.

We were also aware, that the Alberta Teacher's Association (ATA) Code of Professional Conduct Standards 13 & 14 indicate that a teacher:

> …criticizes the professional competence of professional reputation of another teacher only in confidence to proper officials and after the other teacher has been informed of the criticism, subject only to section 24 of the *Teaching Profession Act*.

> …when making a report on the professional performance of another teacher, does so in good faith and, prior to submitting the report, provides the teacher with a copy of the report, subject only to section 24 of the *Teaching Profession Act.*

As such, the ATA generally advises teachers not to participate in anonymous surveys. We contacted the ATA in order to provide them with additional information and clarification regarding the purposes of the survey. Although the survey asks questions about various levels in the organization (supervisor, leadership, organization as a whole), this is to encourage members to think about the relevant psychosocial factor in multiple ways. The results of the survey do not criticize or report on any particular teacher, leader or level of leadership in the organization. It captures the <u>prevailing climate</u> in the organization as experienced by the members of the organization. We were told the ATA would not endorse the survey, but members seeking guidance would be told to participate according to their conscience.

The survey was closed on July 13, 2016.

Interviews

To further explore the issues identified in the survey, uncover issues not addressed by GM@W, and capture other perspectives, qualitative data was collected through interviews with a cross-section of Palliser stakeholders. A total of 68 interviews were conducted, each lasting an average of 2 hours (range of 45 minutes to 4 hours). Notes were taken during the interviews and used for subsequent analysis. Interviews were conducted at the offices rented by the panel, or by telephone. Although some categories overlap (some current or former employees may also be parents), the number of interview participants by primary category is as follows:

- 24 former employees
- 34 current employees (this is a representative sample of employees across all levels and a wide range of positions within the organization)
- 6 trustees
- 4 other stakeholders

Participants were initially invited to submit their requests for an interview through an email account that was created by the panel and accessible only to panel members. The email address was sent directly to Palliser employees and was also available on the Palliser website. Efforts were made to interview all individuals who made a request, however time and resource constraints meant that some individuals who requested an interview were asked to provide written submissions. Specific requests for

participation were sent to Palliser leadership (including Vice Principals, Principals, Directors, Associate Superintendents, the Superintendent on leave, and Trustees).

Initial interviews as well as interviews with some members of the senior leadership team and Palliser trustees were conducted jointly by both panel members. To maximize efficiency, the remaining interviews were conducted independently by one of the two members.

At the start of each interview, participants were reminded of the terms of reference for the panel. Confidentiality of responses was explained. Participants were told that the information provided would be reported in an aggregate format. No information that could identify a particular participant would be included in the report. The only time the panel could not guarantee anonymity was if the participant divulged information that suggested there was an imminent and serious risk to the Board of Trustees or members of the Palliser School Division.

In the initial interviews, participants were asked about their role and interest in the review. This was followed by a single prompt for the participant to tell the panel what they felt was important for the panel members to know. After 12 interviews were conducted in this open format, the responses of the participants and preliminary GM@W results were analyzed for emerging themes.

Based on the emerging patterns and themes in the data, a semi-structured interview protocol was developed specifically for Palliser employees in key positions (the open format was still used with other employees and stakeholders). A semi-structured interview ensures that the same questions are asked of each participant, but enables the interviewers to ask probing questions to get additional detail, and also enables the participant to provide information not captured by the questionnaire. The employee interview questions are included in Appendix C. A separate set of interview questions was developed for the Board of Trustees and is also included in Appendix C.

At the close of each interview the participants were invited to discuss any issues that related to the review terms of reference that had not already been discussed. They were also invited to submit any documentary information they felt was relevant to the panel, or contact the panel if they thought of something they wished to add.

Stakeholder Documentary Submissions

As noted above, stakeholders we could not interview were invited to submit a document detailing the information they wished to provide to the panel. Parent councils were specifically asked to provide submissions in this manner. A number of participants who were interviewed also chose to provide documents to the panel. We received 29 submissions from stakeholders. These included email submissions describing specific incidents, copies of letters alleging harassment and bullying, and a petition with comments from approximately 160 individuals.

Palliser Policies, Procedures and Human Resource Management Data

In addition to the survey, interviews and stakeholder documentary submissions, we requested and reviewed the following information from Palliser:

- A list of all ATA and CUPE grievances filed during the past five years.

- Employee turnover by occupational grouping and reason for leaving for the past five years.

- Exit interview policies and procedures, and outcomes for the past five years.

- Recruitment and hiring policies and procedures, including applicant evaluation criteria for senior leadership positions.

- Absenteeism, sick leave and benefits use by occupational group for the past five years.

- The job description and employment contract for the Superintendent.

- Policies and procedures governing the evaluation of the Superintendent with copies of the last three evaluations (including criteria for evaluation); and the records/minutes outlining the Board's actions as a result of the evaluations.

- Policies, procedures, and practices for Board self-evaluation and copies of the results for last three years and Board actions that followed.

- Reports for the following committee meetings for the past three years:

    o Board – Superintendent Leadership Planning day

    o Board – Senior Administration Leadership Planning day

    o Board – Teacher Advisory Committee

    o Reports/Minutes identifying budget priorities and three-year plan as specified in the December work plan

- Reports from Dr. Sloan and follow up actions from the 2012 and 2008 Reviews

- Report of the Central Office Organization Review in 2014

- Performance management systems information (process, frequency) for senior leaders, teachers and other major employee groups.

- The past three years of audited financial statements, including Statement of Financial Position

- Division Foundational Statements

- Alberta School Act and Regulations

- Current 2015/16 budget and projected budget for 2016/17

- School Generated Funds Procedures Manual

- Travel Reimbursement Procedures

- Division Accounting Procedures

- Purchase Card Policy Manual and Procedures

SUMMARY OF THE EVIDENCE

Survey

A total of 363 Palliser employees participated in the survey, which represents approximately 35% of the total number of employees in the division. This is a healthy response rate and falls well within normal bounds for internally administered organizational surveys (which is typically between 30 and 40%). Statistically, this means that we can be 95% certain that the scores will fall between +/-5% of the averages reported below. We were particularly happy with this response rate given the organizational context and ATA's position with respect to the survey.

Approximately 52% of the participants identified themselves as employees in a traditional Palliser school, while 32% identified themselves as employees in faith-based schools. The remaining 15% of participants categorized themselves as central office staff or "other".

Survey results were analyzed for each of the 13 psychosocial factors as a combined total of all employees, by location, and by gender. Each psychosocial factor is categorized (based on the average score for the factor) as an area of **serious concern, significant concern, minimal concern or relative strength**. Serious concern is the highest level and requires immediate attention.

What is good…
No psychosocial factors had an average response that was high enough to categorize it as a serious concern. Furthermore, **employee engagement** was identified as an area of relative strength across the organization in all locations and regardless of gender.

What is average…
Overall, there are six areas where employees perceive that there are minimal concerns include:
- o **psychological support,**
- o **psychological competencies and requirements,**
- o **growth and development,**
- o **recognition and reward,**
- o **involvement and influence, and**
- o **protection of physical safety**.

What is concerning…
There are also six areas of significant concern, which include
- o **organizational culture,**
- o **clear leadership and expectations,**
- o **civility and respect,**
- o **workload management,**
- o **balance and**
- o **psychological protection.**

As Table 1 below shows. While the areas of concern do not differ substantially by gender, there are important differences between locations. The employees in traditional Palliser schools identify eleven areas of significant concern.

Furthermore, just over 15% of Palliser employees reported being bullied or harassed, either verbally, physical or sexually in the workplace. This compares to an average of 6.7% in other workplaces in Canada that were assessed in 2012 to provide baseline data for the GM@W survey. Additionally, 7.7% of the employees reported experiencing discrimination in the workplace because of their cultural/ethnic background, disability, sexual orientation, gender or age. This compares with 5.5% in other workplaces. Finally, 1.7% of the employees surveyed indicated they felt they have been treated unfairly in the workplace because they have a mental illness. About 1.3% of employees in other Canadian workplaces report this experience.

TABLE 1

Psychosocial Risk Factor	Combined	Palliser Traditional	Faith-Based	Central Office	Female	Male
Psychological support	Minimal Concerns	Significant Concerns	Minimal Concerns	Minimal Concerns	Minimal Concerns	Minimal Concerns
Organizational culture	Significant Concerns	Significant Concerns	Minimal Concerns	Significant Concerns	Significant Concerns	Significant Concerns
Clear leadership & expectations	Significant Concerns	Significant Concerns	Minimal Concerns	Minimal Concerns	Significant Concerns	Significant Concerns
Civility & respect	Significant Concerns	Significant Concerns	Minimal Concerns	Minimal Concerns	Significant Concerns	Significant Concerns
Psychological competencies & requirements	Minimal Concerns	Significant Concerns	Minimal Concerns	Minimal Concerns	Significant Concerns	Minimal Concerns
Growth & development	Minimal Concerns	Significant Concerns	Minimal Concerns	Minimal Concerns	Minimal Concerns	Minimal Concerns
Recognition & reward	Minimal Concerns	Significant Concerns	Minimal Concerns	Minimal Concerns	Minimal Concerns	Minimal Concerns
Involvement & influence	Minimal Concerns	Significant Concerns	Minimal Concerns	Minimal Concerns	Minimal Concerns	Minimal Concerns
Workload management	Significant Concerns	Significant Concerns	Minimal Concerns	Minimal Concerns	Significant Concerns	Significant Concerns
Engagement	Relative Strength	Relative Strength	Relative Strength	Relative Strength	Relative Strength	Relative Strength
Balance	Significant Concerns	Significant Concerns	Significant Concerns	Minimal Concerns	Significant Concerns	Significant Concerns
Psychological protection	Significant Concerns	Significant Concerns	Minimal Concerns	Significant Concerns	Significant Concerns	Significant Concerns
Protection of physical safety	Minimal Concerns	Minimal Concerns	Minimal Concerns	Relative Strength	Minimal Concerns	Minimal Concerns

A detailed discussion of each of the 13 psychosocial factors, including mean (average) response rates and comparisons with other organizations is provided below. The segmented reports from GM@W are contained in Appendix D.

1. **Psychological Support:** Psychological support is an area of minimal concern for most employees in Palliser. Psychological support is defined by GM@W as: "present in a work environment where coworkers and supervisors are supportive of employees' psychological and mental health concerns, and respond appropriately as needed. Equally important are the employee's perceptions and awareness of organizational support. When employees perceive organizational support, it means they believe their organization values their contributions, is committed to ensuring their psychological well-being and provides meaningful supports if this well-being is compromised." [4]

   The average psychological support score for Palliser is 14.7/20.   However, 9% of the employees surveyed perceive it as a serious concern, while 27% perceive it as a significant concern. These proportions jump to 11% and 35% respectively for employees who work in traditional Palliser schools. Employees in other Canadian organizations report serious concerns 8% of the time and significant concerns 25% of the time.

2. **Organizational Culture:** Organizational culture is an area of significant concern for most employees who responded to the survey, with the exception of those in the faith-based schools. Organizational Culture is defined by GM@W as "the degree to which a work environment is characterized by trust, honesty, and fairness. In general, organizational culture has been described as "a pattern of basic assumptions invented, discovered, or developed by a given group." These assumptions are a mix of values, beliefs, meanings and expectations that group members hold in common and that they use as behavioural and problem-solving cues. Culture 'sets the tone' for an organization; if that culture is negative it can undermine the effectiveness of the best programs, policies and services intended to support the workforce. An unhealthy culture creates more stress in the workplace, which lowers employee well-being." [5]

   The average organizational culture score across Palliser is 12.5/20. Approximately 25% of Palliser employees indicate that organizational culture is an area of serious concern, while 34% suggest it is an area of significant concern. This compares to averages of 9% and 29% respectively, for other Canadian organizations.

3. **Clear Leadership & Expectations:** Clear leadership and expectations are "present in a work environment where there is effective leadership and support that helps employees know what they need to do, how their work contributes to the organization, and whether there are impending changes. There are many types of leadership, each of which impacts psychosocial health and safety in different ways. The most widely accepted categorizations of leadership are instrumental, transactional and transformational. Of these, transformational leadership is considered the most powerful. Instrumental leadership focuses primarily on producing outcomes, with little attention paid to the 'big picture,' the psychosocial dynamics within the organization, and, unfortunately, the individual employees. Transformational leaders are seen as change agents who motivate their followers to do more than what is expected. They are concerned with long-term objectives and transmit a sense of mission, vision and purpose. They have charisma, give individualized consideration to their employees, stimulate intellectual capabilities in others, and inspire employees. Effective leadership increases employee morale, resiliency and trust, and decreases

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[4] http://www.guardingmindsatwork.ca/info/risk_factors
[5] Ibid

employee frustration and conflict. Good leadership leads to individuals being 40% more likely to be in the highest category of job well-being, a 27% reduction of sick leave, and a 46% reduction in early retirements with disability pensions. A leader who demonstrates a commitment to maintaining his or her own physical and psychological health can influence the health of employees (sickness, presenteeism, absenteeism), as well as the health of the organization as a whole (vigour, vitality, productivity).[6]

The average score for clear leadership and expectations for Palliser is 13.6/20. Fifteen percent of Palliser employees identified clear leadership and expectations as an area of serious concern. Thirty-three percent identified as an area of significant concern. This compares to averages of 7% and 29% in other Canadian organizations.

4. **Civility & Respect:** Civility and respect is also an area of significant concern for Palliser. It is "present in a work environment where employees are respectful and considerate in their interactions with one another, as well as with customers, clients and the public. Civility and respect are based on showing esteem, care and consideration for others, and acknowledging their dignity. A civil and respectful workplace is related to greater job satisfaction, greater perceptions of fairness, a more positive attitude, improved morale, better teamwork, greater interest in personal development, engagement in problem resolution, enhanced supervisor-staff relationships, and reduction in sick leave and turnover. When a workplace lacks civility and respect, this can lead to emotional exhaustion amongst staff. In addition to health problems, an incivil and disrespectful workplace is associated with greater conflict and job withdrawal. A work environment that is incivil and disrespectful also exposes organizations to the threat of more grievances and legal risks."[7]

Palliser's average score for civility and respect is 13.5/21. Forty-seven percent of Palliser employees perceive this as a serious or significant concern. This compares to approximately 30% of employees in other Canadian organizations who would consider civility and respect a serious or significant concern.

5. **Psychological Competencies & Requirements:** Psychological competencies and requirements are met "in a work environment where there is a good fit between employees' interpersonal and emotional competencies and the requirements of the position they hold. This means that employees not only possess the technical skills and knowledge for a particular position, but they also have the psychological skills and emotional intelligence to do the job. Emotional intelligence includes self-awareness, impulse control, persistence, self-motivation, empathy and social deftness. A fit between employees' psychological competencies and the requirements of the position they hold is associated with fewer somatic health complaints, lower levels of depression, greater self-esteem and a more positive self-concept. It is also associated with enhanced performance, job satisfaction and employee retention. A misfit between employees' psychological competencies and the requirements of the position they hold may result in job strain."[8]

The average score for Palliser overall for psychological competencies and requirements is 14.9/ 20, which means on average it is a minimal concern. However, this score drops to 13.8/20 for traditional

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[6] Ibid.
[7] Ibid.
[8] Ibid.

Palliser school employees, bringing it into the range where it can be considered a significant concern. About 35% of Palliser employees do not feel there is a good fit between their abilities and the positions they hold. This can be compared to about 24% of Canadians who feel the same way about their jobs.

6. **Growth & Development:** Growth and development factors are "present in a work environment where employees receive encouragement and support in the development of their interpersonal, emotional and job skills. Such workplaces provide a range of internal and external opportunities for employees to build their repertoire of competencies, which will not only help with their current jobs, but will also prepare them for possible future positions. Employee development increases goal commitment, organizational commitment and job satisfaction. Employees feel that organizations care when they support growth and development, and skill acquisition and career development directly enhance employee well-being."[9]

   Growth and development is an area of minimal concern for Palliser with an average score of 14.6/20. The score drops slightly for Palliser traditional schools to 13.8/20, which is just enough to categorize it as a significant concern for these locations. Forty-six percent of employees feel this is an area of serious or significant concern for Palliser. Thirty-seven percent of employees working in other Canadian organizations identify growth and development as a serious or significant concern.

7. **Recognition & Reward:** According to GM@W recognition and reward are "present in a work environment where there is appropriate acknowledgement and appreciation of employees' efforts in a fair and timely manner. This includes appropriate and regular financial compensation, as well as employee or team celebrations, recognition of years served, and/or milestones reached. Recognizing and rewarding employees motivates them, fuels their desire to excel, builds their self-esteem, encourages employees to exceed expectations, and enhances team success. This, in turn, provides staff with more energy and enthusiasm and a greater sense of pride and participation in their work. In addition, employees who receive recognition are more likely to treat colleagues and customers with courtesy, respect and understanding. When employees believe that their efforts are not appreciated it can undermine their confidence in their work and trust in the organization. At the least, employees are likely to feel demoralized; alternatively, they may quit. An imbalance between effort and reward is a significant contributor to burnout and emotional distress leading to a range of psychological and physical disorders."[10]

   The average score for Palliser on recognition and reward is 14.1/20 overall and 13/20 for Palliser traditional schools. Approximately 43% of Palliser employees consider recognition and reward a serious or significant concern, which compares to approximately 34% in other organizations.

8. **Involvement & Influence:** Involvement and influence exists "where employees are included in discussions about how their work is done and how important decisions are made. Opportunities for involvement can relate to an employee's specific job, the activities of a team or department, or issues involving the organization as a whole. If employees do not believe they have a voice in the affairs of the organization, they are likely to feel a sense of indifference or helplessness. Job

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[9] Ibid.
[10] Ibid.

alienation, or non-involvement, is associated with cynicism and distress, greater turnover, and burnout."[11]

Employees rate involvement and influence at Palliser at an average of 14.1/20. Traditional Palliser school employees provide an average score of 13.1/20. These are again borderline scores that suggest this psychosocial factor is of minimal to significant concern. About 41% of Palliser employees rate this as a serious or significant concern in comparison to 26% of other Canadian employees who would rate their organizations in this way.

9. **Workload Management:** Manageable work occurs "where tasks and responsibilities can be accomplished successfully within the time available. This is the psychosocial factor that many working Canadians describe as being the biggest workplace stressor (i.e., having too much to do and not enough time to do it). Research has demonstrated that it is not just the amount of work that makes a difference, but also the extent to which employees have the resources (time, equipment, support) to do the work well. Workload management is important because there is a unique relationship between job demands, intellectual demands and job satisfaction. Job demands reduce job satisfaction, whereas intellectual demands, or decision-making latitude, increase job satisfaction. Even when there are high demands, if employees also have high decision-making ability, they will be able to thrive. Having high decision-making latitude also allows for positive coping behaviours to be learned and experienced. Increased demands, without opportunities for control, result in physical, psychological and emotional fatigue, and increase stress and strain. This has a negative influence on performance. Emotionally fatigued individuals also have a diminished sense of personal accomplishment and an increased sense of inadequacy. One of the main reasons employees feel negatively about their jobs and their employers is excessive workload."[12]

Workload is an area of significant concern for Palliser, with an average rating of 13.5/20. Almost half (46%) of Palliser employee's feel they have a difficult time managing their workload. This compares to about 25% of employees at other Canadian organizations who feel this way.

10. **Engagement:** Engagement occurs "when employees feel connected to their work and are motivated to do their job well. Employee engagement can be physical, emotional and/or cognitive. Physical engagement is based on the amount of exertion an employee puts into his or her job. Physically engaged employees view work as a source of energy. Emotionally engaged employees have a positive job outlook and are passionate about their work. Cognitively engaged employees devote more attention to their work and are absorbed in their job. Whatever the source, engaged employees feel connected to their work because they can relate to, and are committed to, the overall success and mission of their company. Engagement is similar to, but should not be mistaken for: job satisfaction, job involvement, organizational commitment, psychological empowerment, and intrinsic motivation."[13]

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[11] Ibid.

[12] Ibid.

[13] Ibid.

Engagement is an area of relative strength for Palliser. Average scores across the organization are 18.5/20. Eighty-seven percent of Palliser employees indicate that they are highly engaged in their jobs. This compares to 53% of employees in other Canadian organizations.

11. **Balance:** Balance is present in a work environment where there is recognition of the competing demands of work, family and personal life. This reflects the reality that everyone has multiple roles: as teachers, parents, partners, etc. "This complexity is enriching and allows fulfillment of individual strengths and responsibilities, but conflicting responsibilities can lead to role conflict or overload. When employers recognize that work-life balance is important, they realize the need for greater workplace flexibility. This flexibility helps minimize conflict by allowing employees to accomplish the tasks necessary in their daily lives. Balance reduces stress and the possibility that home issues will spill over into work, or Vice versa. Balance allows staff to maintain their concentration, confidence, responsibility, and sense of control at work. One source of stress is conflict between work and family roles. When work-family conflict occurs, health and well-being are undermined."[14]

Balance is an area of significant concern across Palliser locations. The average score on this psychosocial factor was 13/20 with 55% of employees indicating that it is a serious or significant concern for them. In comparison 31% of employees working for other organizations in Canada express the same level of concern about this factor.

12. **Psychological Protection:** Psychological protection is "present in a work environment where employees' psychological safety is ensured. Workplace psychological safety is demonstrated when workers feel able to put themselves on the line, ask questions, seek feedback, report mistakes and problems, or propose a new idea without fearing negative consequences to themselves, their job or their career. A psychologically healthy and safe workplace is one that promotes employees' psychological well-being and actively works to prevent harm to employee psychological health due to negligent, reckless or intentional acts. When employees are psychologically protected they demonstrate greater job satisfaction, enhanced team learning behaviour and improved performance. Employees are more likely to speak up and become involved. When employees are not psychologically safe they experience demoralization, a sense of threat, disengagement and strain. They perceive workplace conditions as ambiguous and unpredictable. The organization is at a much greater threat from costly legal and regulatory risk. This can, in turn, undermine stakeholder and public confidence in the organization."[15]

Psychological protection is one of the most significant concerns at Palliser School Division, with an average score of 12.5/20. Sixty percent of employees in Palliser do not feel psychologically safe and rate this as a serious or significant concern. This number jumps to 70% of employees in the traditional Palliser schools. In comparison, 33% of employees in other Canadian organizations would consider this a serious or significant concern where they work.

13. **Physical Safety:** Physical safety occurs when "management takes appropriate action to protect the physical safety of employees. Appropriate actions may include: policies to protect employees' physical safety; training in safety-related protocols; rapid and appropriate response to physical accidents or situations identified as risky; and clearly demonstrated concern for employees' physical

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[14] Ibid.
[15] Ibid.

safety. Research has shown that when employees have higher levels of confidence in safety protection at work, they experience lower rates of psychological distress and mental health problems. The sense of physical safety protection is enhanced by: adequate training with regard to physical safety, trust that the employer minimizes physical hazards, confidence that the employer responds quickly and effectively to safety incidents, and the opportunity to have meaningful input into workplace policies and practices."[16]

Physical safety protection is an area of minimal concern with an average score of 15.2/20 for across the division. 29% of employees in Palliser feel that physical safety protection is a serious or significant concern. This compares to 19% of employees with a similar level of concern in other Canadian organizations.

Interviews & Stakeholder Submissions

The following descriptions reflect the strongest themes that came through in the interviews, and were also reflected in the 29 stakeholder documentary submissions. A total of 50 unstructured and 18 semi-structured interviews were conducted. Strong themes occur when more than 30% of the interviewees from multiple stakeholder groups spontaneously raise the same issue (either in an unstructured interview or when asked one of the open questions in the semi-structured interviews). We distinguish between what participants perceive or believe, and what they have experienced personally or directly observed. We also include some selective quotes that are particularly evocative of each theme and reference to relevant Palliser policies and procedures. The themes are interdependent so that they interact, compounding their effects.

What Palliser Does Well…

There was reasonably consistent consensus across stakeholder groups that 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.

Most participants (both former and current employees) suggested that Palliser has been particularly innovative in its creation of a diverse community with unique learning opportunities. This includes programs for Islamic and other faith-based schools, Hutterite colony schools, and outreach to the German Mennonite and other communities that have fewer educational options.

Many participants also felt that Palliser has a strong, narrow **visio**n that provided a clear focus. Achieving this vision is supported by using data to maintain **accountability**. Success is measured based on the accountability pillars of:

- Safe and caring schools

- Student learning opportunities

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[16] Ibid.

- Student learning achievement

- Preparation for lifelong learning, world of work and citizenship

- Parental involvement

- Continuous improvement

An example that was provided was the school review process which is conducted when a Principal is entering the second year of his or her appointment. The process includes an appreciative inquiry approach where Principals highlight and provide evidence of their accomplishments. Additional data in the form of parent surveys, student achievement, and focus groups provides additional perspective to help identify strengths and weaknesses. Discussions are used to develop a plan to address any areas that are of concern.[17] However, it was also noted that the current approach to accountability might mean that Palliser could be an "uncomfortable place to work" for people struggling to meet the standards established by organizational leaders.

Participants also generally agreed that Palliser has a strong focus on high **educational quality** and creating a **safe and caring environment for students**. Principals and teachers were particularly recognized as dedicated and individuals who care deeply about the children in the district. It was frequently repeated that "Palliser cares about children", although it was also pointed out that this is perhaps to the exclusion of providing a similar environment to other important stakeholders. Threat and risk assessments are conducted at schools to ensure student safety. Literacy and student learning were highlighted as strengths of the division. An example provided was the regular use of Fountas and Pinnell resources to assess student literacy.

A final area of strength that was noted was the move from **site-based budgeting to needs-based budgeting and sound financial systems**. Organizational leaders indicated that this was a key reason that some schools in the district were able to remain in operation. It was also suggested that this was part of a broader initiative to move certain functions and decision-making authority to the central office level. The rationale for centralization was to allow Principals to be "instructional leaders" rather than human resources or facilities managers. We were informed that the idea was to create time for Principals to spend supporting and mentoring teachers. Centralization is, as noted below, also a perceived as a particular challenge for Palliser.

Overall, it was made clear to us that the individuals who came forward to be interviewed, although often fearful, were very concerned about the future of the School Division. They have been very proud to work at Palliser (as current or past employees) and believe there is still a great deal to celebrate. They expressed a high level of distress over the current level of conflict in Palliser and on the whole feel that anything positive about the division, is overshadowed by recent events.

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[17] It should be noted that this is a different process than the school goals meetings that are discussed below in the section on organizational culture and climate.

Palliser's Key Challenges…

Culture and Climate

The strongest and most consistent theme that arose in our interviews was the culture of fear and intimidation at Palliser. Sixty-three of 68 people interviewed had personally experienced, or directly observed, behaviour at Palliser that a reasonable person would characterized as incivility, bullying or harassment. This occurred repeatedly at all levels of the organization, and in the interactions between levels and stakeholders (Board, senior leadership, school leaders, and parents).

We were provided details of many, very specific instances of bullying and uncivil behaviours occurring at Palliser. They included people being yelled at, in person or over the phone. It was not uncommon in these cases for one voice to be raised to the point that other individuals, outside of the room, could hear that someone in the room was receiving a reprimand. Participants described instances where they received a rebuke loud enough that they felt the need to pull the phone receiver away from their ears. We also were provided with many other examples of intimidation tactics, which included:

- slamming books/papers down on a table,
- walking out of meetings,
- leaning over others (looming),
- speaking with an angry tone,
- ignoring,
- refusing to acknowledge another person's presence,
- failing to pass along necessary information,
- speaking over others and not allowing them to contribute to a conversation, and
- speaking to or about colleagues in a sarcastic and demeaning manner.

The terms "belittling" and "undermining" were used frequently to describe the behaviours experienced or observed at Palliser.

More than 50% of the individuals we interviewed expressed fear about coming forward and were very concerned about confidentiality. They were afraid of retaliation against themselves, friends or family members employed by Palliser. It was believed that employees who got on the "wrong side" of anyone on the senior administration team could become the target of a campaign that would force them out of Palliser. The most commonly cited belief was that the target would be transferred into an undesirable position or location. It should be noted that this practice was categorically denied by a number of participants in leadership positions. They stated that this was not a helpful practice and that Palliser did not "do the dance of the lemons."

A particularly illustrative example of this was the concern expressed by many who noted a White Rav 4 parked outside of our offices. They indicated that they thought it was a Palliser vehicle and were afraid someone in the division would see them. The level of fear and emotion in many of our interviews was very high with participants in tears as they related their stories.

It is important to note, that many of the people reporting uncivil or bullying behaviours are current employees who characterize themselves as having good relationships with some or all members of

Palliser senior leadership. A few individuals admitted to having engaged in these behaviours themselves. They were regretful of the behaviour and apologetic, but apologies were not always made to the targets of their incivility. Others indicated that they believed this environment was contributing to a very high level of turnover at Palliser, particularly at the Principal level. Some participants indicated that they were seeking employment elsewhere and would leave when a good alternative arose, unless there was significant culture change.

A small number of the individuals we interviewed were reluctant to accept that this might be occurring at Palliser. This group suggested that the complaints could only be from vindictive former employees. It was furthermore suggested that if current employees had a concern, they were being cowardly and should be brave enough to step forward and report it.

Administrative Policy 171 *Harassment of Students or Employees* prohibits the behaviours identified by participants. It defines harassment as follows:

1. Personal Harassment includes behaviour which may be verbal, physical, deliberate, unsolicited or unwelcome. It, in effect or intent, disparages, humiliates or harms another person. It is behaviour which denies individual dignity and respect and is demeaning to another person. Harassment may include, but is not limited to, references related to age, national or ethnic origin, religion, gender, sexual orientation, disability, race, sources of income or family status. It also includes behaviour which supports a hostile or poisonous environment: intimidation, threats, ostracism, gestures or offensive remarks and bullying.

2. Sexual harassment means any unwelcome behaviour either intentional or unintentional which is sexual in nature that may directly or indirectly affect or threaten to affect a person's job in an adverse manner. It includes but is not limited to: unwelcome physical contact, unwelcome remarks, verbal abuse or display or suggestive pictures, leering, whistling, innuendoes, jokes or other behaviours or gestures of a sexual nature, demands for sexual favours, stalking, embarrassing, suggestive or threatening language.

Despite this policy, we were repeatedly told that these behaviours occur regularly, making the environment at Palliser is untenable and the level of trust throughout the district is very low. This is not helped by negative comments made publicly about former employees, or suggestions that "other school divisions hire the people who don't meet Palliser standards."

One interviewee stated the situation very clearly and eloquently: "there is insufficient care taken to protect the dignity of current and former employees of the Palliser School Division".

Conflict of Interest in Hiring

A second strong theme in our interviews was the perception that the hiring practices at Palliser, particularly at the most senior levels of the organization, have resulted in serious conflicts of interest. The specific allegations were that Palliser has engaged in "nepotism" and "cronyism". It was suggested on numerous occasions that the current leadership team was selected based on personal or family relationships rather than experience and qualifications.

When we probed this issue with participants who had direct knowledge of Palliser hiring practices, we were told that within Palliser individuals who are family members or in close personal relationships

occasionally end up working together in supervisor/subordinate roles. This has occurred at various levels in the organization (within schools and in administration).

We were also told that a number of precautions are taken to ensure that there is no conflict of interest during the hiring process, and that there is no direct reporting relationship between family members. The subordinate in that situation, would be required to report to someone else in the organization. We were referred to Administrative Policy 401, which states:

Background

All persons should have equal opportunities for employment with Palliser Regional Schools. Family relatives of trustees or employees of the division may be employed on the basis of merit providing family relatives are not involved in hiring or supervising the respective positions.

Definitions

Family relatives include spouse, common-law spouse, parent, child, spouse of child, sibling, spouse of sibling, grandparent, aunt or uncle.

Procedures

1. Employees are prohibited from directly supervising or being supervised by a family relative. One or the other person shall accept re-assignment to another school, department or area or seek employment elsewhere.

2. Supervision, for the purposes of this administrative procedure, includes any of:

    1. Assignment of duties;
    2. Approval of requisitions;
    3. Determination of salary/wage level;
    4. Completion of evaluation of performance reports; or
    5. Decision on promotion/retention/transfer.

The hiring process was described to us as follows:

- When there is a vacancy, the position is advertised, primarily on the Palliser website though other outlets may also be used. CUPE has specific rules that are followed regarding posting positions and the length of posting.
- An "ideal candidate" profile is developed that establishes the qualifications and specific experience that would be beneficial for the particular position (e.g. experience in a Hutterite colony school).
- One member of the HR team screens applicants based on the qualifications in the ideal candidate profile.
- A short list of approximately 2-4 candidates is developed.
- Principals are provided with the short list and may be invited to suggest additional names.
- An interview team is created which normally consists of the school Principal, Vice-Principal, one HR specialist and the Associate Superintendent of HR.

- o The committee formed for vacancies at the Principal or Vice-Principal level will also include the Superintendent.
- o The committee formed for vacancies at the senior administration level (Director or Associate Superintendent) includes the Superintendent, Associate Superintendent of HR, and one other member (possibly an Associate Superintendent or another member of the HR team).
- Behaviour-based Interview questions are prepared, and used by the committee during the interview process.
- The decision is normally made based on the consensus of the hiring committee. However, the Superintendent has the authority to make the final decision.
  - o We were told that although the Superintendent might not be in agreement with the committee, it would be very unusual for a Superintendent to overturn the decision of a hiring committee.

The process for hiring the Superintendent is different than other positions in Palliser. It is typically managed through the Alberta School Boards Association (ASBA), which acts as a search firm. Trustees are included in the selection of the Superintendent. Some concerns were expressed regarding the heavy reliance on the ASBA. The same individual who as involved in hiring the Superintendent also facilitates the Superintendent's evaluation.

Despite these policies and procedures, there remains a very strong perception among a large number of interviewees, that there is nepotism and conflict of interest at the most senior levels of administration. The primary concerns are:

- That senior leaders are using their influence to ensure family members or friends are hired into other senior leadership positions when other equally or better qualified people have applied for the position.
- That this confers both a financial benefit and undue level of influence over organizational decision-making that is inappropriate in a public institution.
- That the close personal ties among senior leaders make it exceptionally difficult for individuals who have complaints about any of those senior leaders to come forward. The belief is that any complaints would be dismissed out of hand, or the complainant could become the target of a retaliatory campaign ultimately leading to loss of employment or other punitive measures (e.g. transfers/appointments to undesirable locations or jobs).
- That no policy can adequately address this problem when there is a family relationship between the Superintendent and any other member of the senior leadership team. Some interviewees suggested that there are sufficient job opportunities elsewhere, therefore family members should never be hired in direct supervisor/subordinate relationships. They felt this was a policy that should apply at all levels of the organization.

Those who did not agree that nepotism was a problem pointed to the existing policies and procedures to show that Palliser took appropriate precautions to prevent conflict of interest situations in hiring. They stated that when family relationships existed, senior leadership members were very careful to remove themselves from any decision-making related to that family member. It was stressed that Palliser's goal is to hire the best candidate for the job. They also pointed to human rights legislation and believed that refusing to hire someone based on family status could be considered a violation of the law.

Ineffective or Unfair Performance Management

There are two aspects to this particular theme. The first relates to performance management of teachers and Principals. The second relates to performance management of the Superintendent.

The performance management system for teachers is facilitated by the HR team at Palliser and it was reported to us that this is evolving to increase consistency in the process and in the specific criteria used for evaluation. The current process is documented in Administrative Procedures 411, which is based on Alberta Education Policy 2.1.5. All teachers on continuing and probationary contracts with the division complete an annual professional growth plan. The professional growth plan:

- Reflects goals and objectives based on an assessment of learning needs of the teacher;
- Relates to the *Teaching Quality Standard*; and
- Takes into consideration the educational plans of the school, the division and Alberta Education.
- Is reviewed by the Principal and central administration

Principals are primarily responsible for teacher supervision. Performance evaluations are conducted only when:

- It is requested by the teacher,
- The information is required for a specific employment or certification decision,
- The teacher may not be meeting the *Teaching Quality Standard.*

If it is determined that as a result of the evaluation a teacher's performance does not meet acceptable standards, the teacher "as part of a team" is required to formulate a plan for improvement. If, at the end of the performance improvement plan, it is determined that the teacher does not meet the *Teaching Quality Standard*, the Superintendent makes an employment recommendation to the Board. The supervision and evaluation flowchart is attached as Appendix E.

The specific concerns expressed by current and former administrators with respect to the evaluation of teachers are: a) that there is no opportunity or policy in place for progressive discipline, and b) that Principals are sometimes encouraged to put teachers on performance improvement plans with very little provocation and before they have had an opportunity to coach and mentor the teacher. The system was described as either black or white, you are in, or you are out. One senior administrator confirmed very clearly that this is indeed the approach in Palliser by stating that people in the division had better "get on board or get out!"

Evaluation of Principals and Vice Principals is described in Administrative Procedure 422. Relevant sections are provided below:

> The evaluation process for all school administrators is an improvement-oriented process that should be primarily self-directed and ongoing rather than cyclical in nature…

> Evaluation of Principals is a responsibility of the Superintendent or designate…

> The Principal is responsible for evaluating the performance of the Vice Principal(s)…

The evaluation of the Principal shall be based on specific performance criteria which derive primarily from the responsibilities of the Principal outlined in Administrative Procedure 420 (i.e., Appendix 420A – Principal Quality Practice) and the duties stated in the School Act.

The evaluation of the Vice Principal shall be primarily based on the performance responsibilities or job description for the administrative position according to the Principal Quality Practice.

Supervision of school administrators by the immediate supervisor shall include:

1. Providing support and guidance to administrators, including assisting administrators to become familiar with the professional responsibilities as outlined in the Teaching Quality Standard, Appendix 420A – Principal Quality Practice, as well as pertinent sections of the *School Act*.
2. Observing, receiving and sharing information from any source about the quality of instruction provided to students and/or administrative practice an administrator provides to the general school community; and
3. Identifying the behaviours or practices of an administrator that:
   - are deserving of recognition; or
   - might indicate the need for evaluation.

One of the primary mechanisms for supervision and providing guidance to school administrators are school goals meetings. More than 30% of the interview participants indicated that school goals meetings are particularly unpleasant and evaluative, which substantially undermines their effectiveness as a feedback mechanism. School goals meetings normally occur twice each year. Data is provided to Principals and Vice Principals and reviewed during the meetings. Many individuals (both current and former employees) who have been present during these meetings indicate that the focus is almost exclusively on negative results. The tone of the meetings is described as aggressive and feedback is given in a condescending or harsh manner. We were told that it appeared the meetings were designed to "rough up" the Principals or Vice Principals and then "finish them off".

School administrators (both current and former) consistently indicated that the school goals meetings could be very useful. They want the feedback to help them improve, but the manner of delivery closes off any opportunity for dialogue. School administrators are pressured to address problems identified very quickly and are given little or no support to do so. They are also given little opportunity to explain why a situation may be occurring or respond to the criticisms. Any explanation is regarded as being defensive and obstructive. We were frequently told that school administrators are afraid to share information, because it may result in pressure for them to remove a teacher. The current approach is perceived as demoralizing, and those involved have been observed by other interview participants leaving the meetings in tears. More than one senior leader in the organization suggested they were bothered by the approach they observed and the way people have been treated in these meetings.

We were told that the overall approach to supervision and performance management at Palliser is guided by the methods in the Zone of Proximal Development.[18] This is a theory of learning developed for children. The theory suggests that learning can be structured using a strategy of scaffolding, to help

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[18] Vygotsky, L. (1978). Interaction between learning and development (pp. 79-91) in *Mind in Society* (Trans. M. Cole). Cambridge MA: Harvard University Press.

the child learn by building on existing knowledge. Although a key premise in the Zone of Proximal Development theory is that the child be supported throughout, those who described how it was used in Palliser suggested that the key idea was to place the teacher, or school administrator in a position where they were moderately uncomfortable, and that this would help them improve their performance.

The second concern raised with respect to performance management relates to the evaluation of the Superintendent. The process for evaluation of the Superintendent was described to us by Board members as well as senior members of the leadership team at Palliser. It is described in Policy 12, which specifies the areas of responsibility for the Superintendent and broadly explains how the evaluation should occur. The Superintendent gathers information from a number of sources, which include student achievement results, surveys, and the evaluations of direct reports (among other types of data). Similarly, the evaluations of the Associate Superintendents include the evaluations of Directors and their subordinates. In this way, the evaluation system is intended to ensure the Superintendent's performance is based on multiple sources of data, including the performance of employees throughout the division.

The process of information gathering is facilitated by the ASBA, and presented to the Board at an annual retreat. The criteria and data collected for the evaluation is defined in Policy 12 and included in Appendix F. The main criteria include: a) student welfare, educational leadership, fiscal responsibility, personnel management, policy implementation and procedure development, Board relations, three year education planning and reporting, organizational management, communications and community relations, and leadership practices. Of particular interest to this review are the criteria related to personnel management, Board relations, communications and leadership practices, which include among other standards:

- Practicing leadership in a manner that is viewed positively and has the support of those with whom he works most directly in carrying out the directives of the Board and the Minister.

- Developing and maintaining positive and effective relations with provincial and regional government departments and agencies.

- Working collaboratively with the corporate Board, staff, students, parents, school councils and community members in establishing a positive and innovative culture and sense of pride in the division.

- Having overall authority and responsibility for all personnel-related issues, except the development of mandates for collective bargaining and those personnel matters precluded by Board policy, legislation or collective agreements.

- Ensuring the coordination and integration of human resources within the division.

- Monitoring and improving the performance of all staff.

- Establishing and maintains positive professional working relations with the Board.

- Honouring and facilitating the implementation of the Board's roles and responsibilities as defined in Board policy.

- Providing the information which the Board requires to perform its role in a timely manner.

- Taking appropriate actions to ensure positive external and internal communications are developed and maintained.

- Ensuring that parents and students have a high level of satisfaction with the services provided and the responsiveness of the Division.

- Keeping the Board informed through the provision of appropriate monitoring reports.

- In consultation with the Chair, serving as spokesperson for the division for the media and public in order to keep the Board's messages consistent and accurate.

Policy 12 also includes an interview guide that is intended to be used with Principals and the Superintendent's direct reports to solicit their feedback regarding leadership practices. The policy does not state who is to administer the interviews, or how they are to be administered. It is our understanding that these are done by the ASBA facilitator in a focus group setting. The interview guide includes the following questions:

1. What evidence can you cite to support or refute the following:
   a) the Superintendent provides clear expectations and direction?
   b) the Superintendent provides effective educational leadership?
   c) the Superintendent establishes and maintains positive, professional working relationships with staff?
   d) the Superintendent unites people toward common goals?
   e) the Superintendent demonstrates a high commitment to the needs of students?
   f) the Superintendent empowers others?
   g) the Superintendent effectively solves problems?
   h) the Superintendent exercises leadership consistent with the Board's stated vision and values?

2. What does the Superintendent do, if anything, to help you do your job?

3. What does the Superintendent do, if anything, that makes doing your job more difficult?

The specific concerns reported to us with regard to performance management and evaluation of the Superintendent can be summarized as follows:

- There is a lack of Board ownership over the evaluation process. ███████████████
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  Redaction - Section 17(1) of the *FOIP Act*

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- There is a lack of follow up on areas identified for improvement.
- The criteria for evaluation of the Superintendent are insufficiently comprehensive. For example, none of the evaluation criteria for the Superintendent includes responsibility for a safe culture/climate for employees. The process for gathering qualitative feedback from Principals and direct reports during the Superintendent's review fails to identify serious issues, because responses are not confidential. ███████ Redaction - Section 17(1) of the *FOIP Act* ███████
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- There is a perceived lack of objectivity because the facilitator has been involved in both the hiring and subsequent evaluation of the Superintendent.

Inappropriate Employee Monitoring

Our interview process also identified a persistent belief that Palliser monitors employee email for illegitimate purposes. Examples of what was considered an illegitimate purpose included email monitoring to find out if employees were critical of anyone senior administration, or monitoring to find out if Board members were communicating directly with employees. This was a perception of current and former employees. None were able to provide direct evidence that this was the case, but related incidents that were "suspicious" based on the timing of follow-up emails or telephone calls and questions asked of them. A small number said they had received a notice that their email had been accessed by someone. Others indicated that the blind copying option might be used to circulate emails to people who should not be, or were not intended to be, included in the email exchange.

When asked about the practice of monitoring email, Palliser employees knowledgeable about information technology and this issue in particular, indicated that Palliser does monitor email for the protection of students. However the monitoring is restricted to internet activity that might indicate that students are at risk (e.g. accessing pornography, use of terms like death or suicide). It was suggested that it would be very costly and time consuming to be monitoring email for other purposes. We were told that the only Palliser policy related to this is contained in Administrative Procedure 140 *Responsible Use of Electronic Information Resources*.

When participants were asked about their awareness of policies regarding the use of electronic resources, most employees who were interviewed were unsure whether such a policy existed. Most thought there probably is one, but did not recall exactly where they might find it or what it said. They believed they may have signed something when they were hired that indicated they understood how they were expected to use the internet.

We were also told that there is currently no policy or procedure that states clearly the degree or nature of electronic monitoring that Palliser will engage in, or what degree of privacy Palliser employees can expect when using Palliser computers.

Ineffective Complaint Handling and Investigation

The perception that complaint handling and investigation at Palliser is ineffective arose from all stakeholder groups. The key concerns are with respect to minimizing the seriousness of complaints before they are investigated, and procedures for complaint handling that are unclear to the public or perceived as biased.

There was a strong public perception that long-standing concerns brought forward to the Board of Trustees were minimized or ignored by Board members and the senior leadership team at Palliser. Many of the statements made by those in leadership positions at Palliser would seem to support this belief. During the interviews we were told:

"The people complaining are just disgruntled ex-employees."

"90% of complaints are from parents who did not get what they wanted."

"Employees should go to the ATA if they have a complaint."

"This is all because of the crazies that show up to Board meetings."

Examples of the complaints that were identified as having been ignored include complaints about the culture at Palliser (described above), excessive alcohol consumption, inappropriate off-duty conduct of Palliser employees, and personal use of Palliser vehicles.

With respect to alcohol, were told by participants with direct knowledge of Palliser accounting procedures, that there is no clear policy regarding alcohol purchases by Palliser. However, it is well understood that this is not acceptable. Furthermore, the cost of alcohol purchased by employees who submit meal receipts (for meals purchased while on Palliser business) is not reimbursed. We were told that alcohol is not to be purchased with Palliser funds, except in rare and special circumstances.

With regard to complaints of inappropriate off-duty conduct, ████████████████████████
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Redaction - Section 17(1) of the *FOIP Act*
████████████████████████████ e were told that there is currently no policy or procedure that deals with off-duty conduct of Palliser employees.

With respect to the use of Palliser School Division vehicles for personal travel, participants were concerned that the cost of owning these vehicles was excessive and wasteful of public funds. It is our understanding that the decision to purchase vehicles was based on an economic analysis that compared the cost of purchasing vehicles (inclusive of wear and tear, maintenance and depreciation) with reimbursing travel at the rate set by the Board per Administrative Procedure 508. This economic analysis has not been reviewed since the decision to purchase Palliser vehicles was undertaken. There is also no policy that specifies when and where Palliser vehicles can be used.

The second key concern about complaint handling and investigations at Palliser is that the process is not transparent and may be biased. As noted previously, stakeholders who were interviewed were very concerned that complaints about senior leaders (including senior administrators and the Board) are investigated by individuals who are supervised by these same senior leaders. Some participants also indicated that the rules of natural justice are not always followed when complaints involving employees are investigated. For example, if allegations are made by a student against an employee, it was suggested that the employee may not be told the particulars of the allegation. When we asked about the investigation process, we were told that those conducting the investigations had received training in proper procedures. We were also told that certain types of complaints must be handled carefully in order to protect the student. It was not clear whether an employee could be subject to discipline without being provided the particulars of a complaint.

Some participants suggested that there are certain types of complaints that would better be handled by an external, investigator and/or independent complaint adjudicator. It was clear in the interviews that some very specific information about investigations was known by people in the organization who should not have that information. Stories about investigations into Human Resources issues, from individuals who would not have first-hand knowledge, were relayed to us on several occasions. They

included details and findings that should have been confidential. It was not clear how these individuals came to possess the information, but it is an indication that policies and procedures for maintaining confidentiality are not as effective as they should be.

It was further pointed out that investigation and adjudication cannot be managed by the Board of Trustees. This is particularly important when the complaints are about Board members, or when the Board might be required to hear an appeal.

The Policies and Administrative Procedures that we are able to locate that address complaints and investigations include:

1. *AP 353 – Student Investigations*, which relates to questioning students regarding a breach of rules or school incidents.

2. *AP 356 - Alcohol and Drugs,* which prohibits the possession and/or use of alcohol, illicit drugs or inappropriate prescription or non-prescription medications on school property.

3. *AP 407 – Public Interest Disclosure Act (Whistleblower Protection),* which establishes procedures for reporting "Wrongdoing". Wrongdoing is narrowly defined as:
    - a contravention of an Alberta or Federal Act and/or regulation,
    - an act or omission that creates:
        - a substantial and specific danger to the life, health or safety of individuals other than a danger that is inherent in the performance of the duties or functions of an employee, or
        - a substantial and specific danger to the environment,
    - gross mismanagement of public funds or a public asset, and;
    - knowingly directing or counselling an individual to commit a wrongdoing.

4. *AP 132 - Emergency Measures,* which refers to investigations following critical incidents or emergencies.

5. *Board Policy 3 – Role of Trustees* Board Policy 3 indicates that:

    > The trustee, upon receiving a complaint or an inquiry from a parent, staff member or community member about operations, the trustee will refer the parent, staff member or community member back to the teacher, Principal or department and will inform the superintendent or designate of the action.

6. *AP 171 – Harassment of Students or Employees,* which includes the following procedures:

    a) Students or employees who experience harassment should:

        o Wherever possible, keep a written record of dates, times, the nature of the behaviour, the names of individuals who may have witnessed the incidents and any action they may have taken to try to stop the harassment.
        o If practicable, directly advise the offender, either verbally or in writing, that his/her behaviour is unacceptable and unwelcome and ask him/her to stop.

- o Report promptly the details of the complaint to a person in authority (teacher, the Principal or the Superintendent).

b) If appropriate, the complaint may be dealt with informally. In such an instance, the person in authority should:

- o Assist the complainant in speaking to the offender directly, or speak to the offender on the complainant's behalf.
- o Advise the offender that it be expected the harassing behaviour will cease immediately.
- o Advise the offender that if the behaviour is in violation of this administrative procedure and does not cease, a formal harassment complaint may be filed.
- o Apply appropriate sanctions as necessary, including but not exclusive to a warning, an offering of a verbal or written apology, suspension or recommendation for expulsion

c) Where it is deemed necessary for a formal complaint to be filed, it shall consist of a signed written statement outlining the charges, describing the specific incident or incidents, the dates (as specific as possible), and any witnesses who may have been present. All formal complaints must be filed with the Superintendent or designate.

- o A formal complaint may be filed up to six (6) months from the date of the most recent incident cited in the letter.
- o The Superintendent or designate shall advise the alleged offender, in writing, of the nature and the specifics of the allegations, that an investigation will be undertaken, and inform his/her of their rights under system policy and other relevant legislation.
- o A copy of the formal complaint shall be provided to the alleged offender.
- o The Superintendent or designate will ensure an investigation is conducted into the complaint, which may consist of personal interviews with the complainant, the alleged offender and others who have direct knowledge of the incidents or circumstances that led to the complaint.
- o The Superintendent or designate believes the complaint is valid, the appropriate disciplinary action shall be levied, and may include expulsion in the case of a student and termination in the case of an employee. Disciplinary action does not exclude other legal action that might be taken

d) Whether the complaint was informal or formal, the resolution process shall not exceed thirty (30) working days.

e) The decision may be appealed through the next level of the Palliser Regional Schools organizational chart (AP 450). Student harassment appeals are handled in accordance with Policy 13 – Appeals and Hearings Regarding Student Matters.

f) All correspondence and reports relative to alleged harassment shall be held separately in a confidential file to be retained by the Principal or the Superintendent.

- o If allegations are not supported, the file shall be destroyed (one (1) year after the person in authority's ruling is rendered).

- o If the investigation supports the allegations in the letter of complaint, copies of all supporting documentation shall be placed on the offender's confidential file (in the case of a student) or their personnel file (in the case of an employee).
- o After a period of three (3) years, the student and/or the parent(s) may request that all such related material be removed from the student's confidential file. Similarly, in a case involving an employee, after a period of three (3) years, the employee may request all such related material be removed from his/her personnel file. The decision with regard to the disposition of the material shall be at the discretion of the Superintendent.

We were unable to find a clear complaint process for non-employee stakeholders to follow, and no accountability for reporting to the public or individual who made the complaint that the complaint had been investigated and appropriate action taken. These policies and procedures also suggest that the individuals responsible for investigations are normally the Superintendent or the Associate Superintendent of HR, which is perceived as problematic where there are close personal ties between the senior members of the leadership team, where the complaint is about a very senior member of the organization (e.g. Superintendent or Board member), or where the investigator is supervised directly or indirectly by the person about whom the complaint has been made.

Micromanagement

Another consistently expressed concern was that the move towards centralizing the district, though positive initially, may have gone too far. There was general agreement that centralized budgeting has been positive overall, and resulted in a more equitable distribution of funds. However, several concerns were expressed that centralized decision-making had crept into pedagogical and instructional areas. This has left teachers and Principals feeling as though they have little ability to be creative, manage the unique contexts and students in their classrooms, and generally do what they are trained to do. We were told that there has been increasing pressure to implement very specific instructional approaches that may not be suitable or effective in all environments or with some students. While participants recognized that using some consistent tools throughout the division enables the collection of important data for comparison, they pointed out that when collecting data becomes more important anything else, it can make the delivery of education mechanical and less effective. Many teachers told us they felt disempowered by overly prescriptive directives from Palliser leadership.

Moreover, we were told that this had the potential to negatively impact one of Palliser's strengths, which is the diversity of its programs. As one submission indicated: "There is tension between our Society and Palliser. There is a difference of educational vision." The division has not yet figured out the best way to best balance the unique approaches of its faith-based schools with directives that demand consistency. This puts school administrators in a difficult position and there is insufficient communication between the Societies and Palliser leadership.

Some of the senior leaders in the organization agreed that centralization had perhaps gone further than it should. For example, we were told that Principals need to be able to develop their teams, and that they should not be spending their time working through "an onerous process to buy a boot rack."

Stifled Internal Communications

There was general agreement among those interviewed that many good efforts were made to facilitate both internal and external communications. Most participants acknowledged that external

communications were particularly difficult right now and that communications staff were attempting to combat negative public perceptions of Palliser as best they could.

However, it was also perceived that communications tended to focus on senior administration activities rather than activities across the institution, or at the school level. Stakeholders particularly highlighted frequent communications that are "from the office of the Superintendent" as "propaganda" rather than objective or particularly useful. Employees believed that communications personnel have the opportunity and ability to be very effective, but believe their mandate is to "praise the superintendent to the exclusion of all else."

Of greater concern was the pattern of perceptions and events that indicate a very serious problem with information flow and feedback to senior members of the leadership team and the Board of Trustees. Events that are particularly illustrative include the fact that the 2014 organizational review of central office was not released to the public until 2016. It was consistently believed that this was because there was something in the report that senior administration or the Board did not want the public to know. It was suggested to us that this was a "cover up". The report has since been released and can be found on the Palliser website.

Additionally, on May 12, 2016, a letter was sent to all Palliser staff regarding proper protocol for communication with Board members. The content of the letter is replicated below:

> This is a joint letter from the office of the Superintendent and the Board of Trustees. It has come to the attention of both the office of the Superintendent and the Board of Trustees that situations have arisen where staff have felt uncomfortable and uncertain when faced with inquiries, questions or requests directly from a Trustee of the Board. The purpose of this letter is to remedy this uncomfortable uncertainty by confirming proper procedure and protocol in the event that any staff member of Palliser Regional Schools receives a request, direction or inquiry directly from a trustee of the Board.

> The Board of Trustees and the Superintendent have unanimously agreed and confirmed that in the event of such an inquiry, direction or request, the staff member should advise the Trustee that their question, request or direction should be directed to the Superintendent.

> The Superintendent and the Board trust that this written clarification and confirmation of the required procedure will be of assistance to any and all staff in dealing with such inquiries to ensure proper governance and communication occurs. Any staff member having questions with respect to this should feel free to contact the office of the Superintendent.

While we were told that the letter was intended to refer to very specific types of issues and to prevent Board members from "interfering" in Palliser operations, it had the effect of completely closing off communications with Board members. It also fed the perception that the Superintendent runs the Board. We were told that staff interpreted this as a moratorium and were afraid to speak with Board members at school events. It also meant that all communications would be filtered by the Superintendent. This was particularly problematic given the existing culture of fear, the evaluation process for the Superintendent, lack of trust between senior administration and the Board, and pre-existing concerns about complaint investigations. Senior leaders and Board members, looking back at

the letter, felt it was misinterpreted, and probably ill-advised. They felt it had further contributed to the level of mistrust in Palliser.

Finally, we were also told that crucial information was not shared among Board members.

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Ineffective Board Operations and Governance

The following provides a summary of the feedback received under our Board Governance topic.

The general perception of most of the individuals interviewed is that the Board has been largely ineffective and unable to function in a manner that would enable them to address the concerns of stakeholders. Board meetings were described as "echo chambers of hatred". Some stakeholders felt the Board should be disbanded entirely, while others felt it was finally beginning to move forward in a productive direction. As noted previously, it was a consistent concern that there is little trust among Board members, or between the Board and senior leadership, making it almost impossible to operate effectively.

Redaction - Section 17(1) of the *FOIP Act*

questioning, the analogy that the Board was not "playing in their own sandbox" came up too many times to be ignored. It was clear that the roles and responsibilities of the Board, Board members and the CEO, were not well defined. There was a persistent belief that the Board and senior leadership should have "separate sandboxes". This analogy has fostered an approach to separation so carefully controlled that it reduced the degree of interaction and when interaction did occur it was highly controlled and directed. This particular thinking appears to be one of the main reasons the memo of May 12, 2016, was issued, and the reason that it was interpreted as virtually forbidding Board member and employee interaction except under rigid conditions. The extreme approach at Palliser is exemplified by the number of calls made to Palliser's legal counsel for the most trivial procedural issues that arise during Board meetings. It was alleged that rather than changing ineffective or inappropriate policies, Board members simply do not follow them.

Another persistent issue raised was the belief that the Superintendent "controls" the Board, rather than reporting to the Board.

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There was general agreement by those who are directly involved in developing the agenda for Board meetings, that the items for discussion and information are determined by the Superintendent and the Board Chair. This also fed the perception that the Board was being controlled by the Superintendent. Although Policy 12, clearly states: *the Superintendent is …accountable to the Board for the conduct and operation of the division,* some current practices and perceptions do not reflect this intention.

Board members told us they want to be more involved in the development of the Board agenda. They would also like to have the agenda and backup documents sent to them in a timelier manner. Currently they receive the agenda, and a large package of supporting documents on the Thursday or Friday before a Tuesday Board meeting. This is not sufficient time to review and digest the materials. They suggested

that Board packages should be sent out at least one full week in advance of the meeting. The Board members experienced circumstance where they felt pressured to pass motions of significance without sufficient information or time for discussion. They did not want to be or perceived to be 'rubber stamping' the items being brought forward.

Concerns were also expressed by Board members regarding the structure of Board meetings. They felt that too much time was spent hearing administrative reports. While it was recognized that the information provided was important and valuable, participants felt that the information could be summarized more effectively so that Board time could be dedicated to other activities. We were told that the agendas should be structured so more time is available for discussion and debate of important motions, developing future directions for the division, reviewing and following up on the performance of the Superintendent; and developing skills to improve Board member performance.

Finally, Board members were aware there could be circumstances where important items needed to be added to the agenda at the last minute, and input from the public who attend Board meetings is important. They felt this practice needs to be managed more effectively. Members of the public have been allowed to make statements at Board meetings that are inappropriate and force the Board to take discussions in camera far too frequently. This is in part related to the discussion above regarding the concern that there is no clear and effective way for stakeholders to bring complaints forward and to know they have been investigated and appropriately resolved.

Overall, there is a deep sense of frustration within the school division about Board operations. Currently, most of the participants we interviewed did not feel that the Board has, to this point, been acting in a way that is accountable to their stakeholders.

Palliser Human Resources Management Data

We requested a variety of documents and information from Palliser to provide additional context with respect to our review. Unfortunately, much of the human resource management data we requested was not available. It was reported to us that some of the information was not in a readily accessible format and would require many hours of HR staff time to accumulate. The information we were supplied was submitted by the Associate Superintendent of HR in a summary format and late in the review process which precluded detailed discussions regarding the data. We were also prohibited from conducting any part of the review on Palliser premises, which prevented direct observation and examination of the HR data and systems. This is not to suggest that the data provided is not accurate, but that it is incomplete or presented to us in a way that is not typical and therefore of very limited value.

Turnover:

School Administrator Category: Three year turnover information for this group of employees was provided, and broken down into multiple categories of movement including: leaves of absence, transfers, promotions, resignations and retirements. There were 8 resignations in this group over the 3 years, which the tables provided to us (and included in Appendix G) indicate represents 4% of the population of Principals and Vice Principals. This would mean that there were a total of 200 Principals

and Vice Principals in the school division between 2013 and 2016 (200 x .04 = 8). A review of the Palliser directory we were provided indicates that there are 70 Principals and Vice Principals in the division.

The table below shows the statistics using the raw data provided by HR, and the average of 70 employees in this category:

	2013-14	2014-15	2015-16	2016-17	Total	Total %
LOA	1	0	1	3	5	7.1%
Requested Transfer	4	4	1	3	12	17.1%
Internal Promotion	1	4	10	4	19	27.1%
External Promotion	0	2	3	0	5	7.1%
Resigned	1	2	2	3	8	11.4%
Retired	1	4	3	1	9	12.9%
Transfer	1	3	1	0	5	7.1%
Return to Teaching	0	0	2	0	2	2.8%

As the table highlights, the majority of movement in this category is attributed to promotions and transfers. Movement was also characterized as voluntary vs. involuntary. Organizations are typically concerned with voluntary and involuntary turnover rates and patterns because they may indicate problems within the organizational culture, with training or with hiring practices. Looking at the number of people who left Palliser altogether (due to external promotion, resignation or retirement), the voluntary turnover rate for Palliser administrative staff over 3 years appears to be approximately 31% (22/70), which is an annual average of approximately 10%. Overall the degree of movement in Palliser school administration raises some red flags. It appears high which normally indicates there are underlying issues that may be creating instability at the school level.

Certificated Staff: Data was provided regarding turnover for certificated staff (teachers) and is also included in Appendix G. The total number of certificated staff in the 2014-15 school year was 441. The total turnover from terminations, resignations, retirement, severance, and contract end was 12.7%. In the 2015/16 school year, the turnover reported was 7.47%. Although the change from year to year was reported, this is not sufficient to show any longer term trends.

Support Staff: The data we were provided with respect to support staff is included in Appendix G. It provides data related to dismissals, resignations, retirement and surplus. In 2014-15 the total turnover for this category of Palliser staff was 18.9%, there were 455 people who fall into this category. The turnover in 2015-2016 was 11.24% (with 507 people falling into this category).

As noted above there is some difficulty with the data provided in that it is not comprehensive and has not been consistently collected or analyzed. We are told this is being remedied.

Transfers: In addition to the numbers provided regarding turnover at Palliser, we were also provided the results of the Teacher Transfer Satisfaction Data from 2011-2016. The summary of this data is provided in Appendix H. There are summaries from a total of 43 surveys across the five years. The average satisfaction scores is 4.7/5 in the first 3 years and 7.85/10 in the past two years. The results for 2015-16 year have an average score of 6.88/10. The qualitative comments include a mix of positive

comments and recommendations for improvement of the process, particularly with respect to timing and communication about transfers.

Absence and Sick Leave Data: We were provided workers' compensation summary data from 2011-2016. This data shows the number of claims for injuries or illnesses sustained by employees arising during or out of the course of their employment at Palliser. The total number of claims in that period is 45, with the highest number of claims occurring in 2015. Twenty-one of the claims resulted in lost time, while 24 required medical aid administration. The majority of claims occurred in Lethbridge County. The graphs below show the five year trends for WCB claims.

WBC Claim Data

LTC and MA
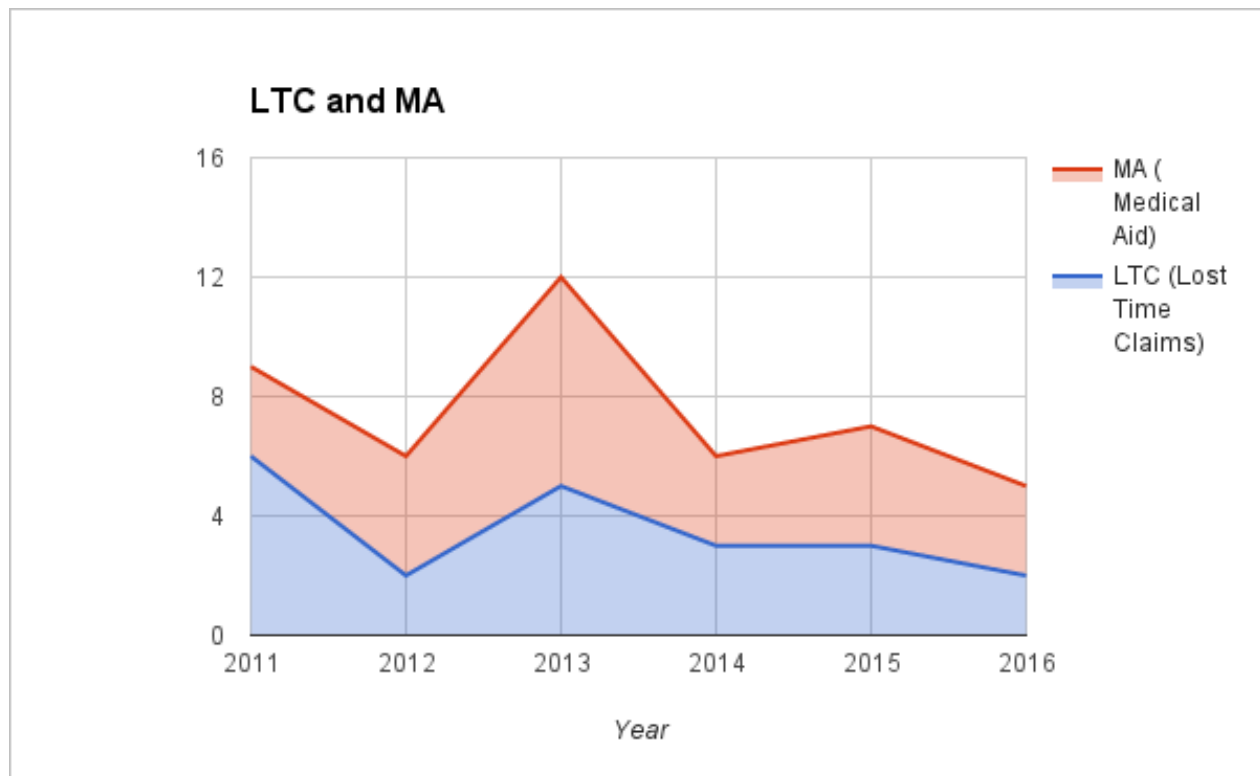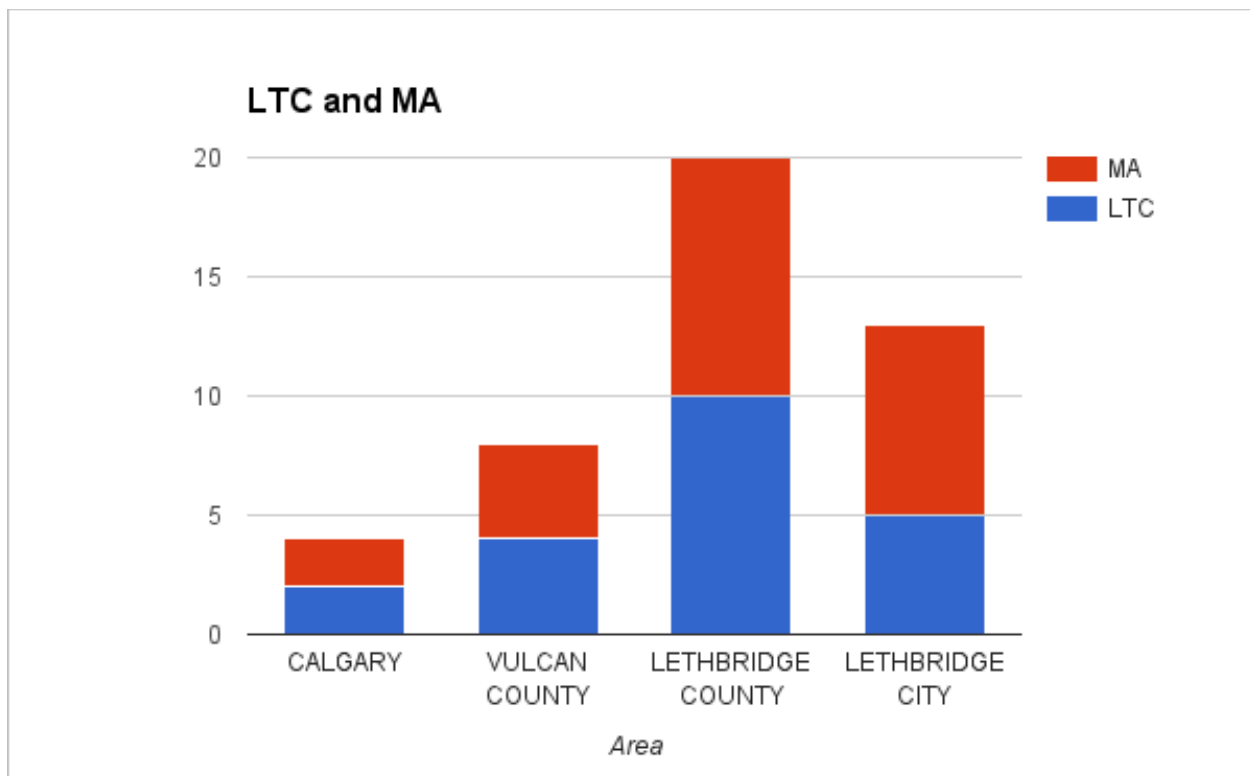
Appendix I contains summary data on sick absences for Support Staff in Palliser for the 2015-16 school year. We were not provided similar data for certificated staff. As with other data we received, this is a brief snapshot that prevents us from assessing trends or comparing occupational groups. We include it as a starting point and encourage Palliser to prepare comparative statistics for analysis on a quarterly and annual basis. A total of 353 Palliser Support Staff took 1957 sick days in 2015-16. A little less than half of this time is accounted for by individuals taking less than 3 sick leave days. The average days used per staff member who took leave is 5.5. The total number of staff who did not use sick days was 154, or 39%.

Health Information: We were provided with a summary document provided by the Alberta School Employee Benefit Plan (ASEBP). It is attached as Appendix J. The summary is for Palliser School Division and uses claims data from January 1, 2015 to December 31, 2015. It evaluates the prevalence of particular risk factors for chronic disease, including: weight, high blood pressure, diabetes, depression and elevated cholesterol. Plan costs, prevalence and adherence to treatment or medication for these conditions are compared with average costs across ASEBP. The document suggests that the general health of Palliser employees is similar to the health of employees in the ASEBP plan.

Grievance and Complaint Data: The information we were provided on August 14, 2016 is as follows:

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As noted with respect to other types of data provided, this is insufficient to draw conclusions about trends or patterns.

Financial Operations:

Several documents were reviewed to examine the financial position of the district. These included:

- three prior years audited financial statements
- the management letters that accompanied the audit
- purchasing policies and procedures
- 2015/16 budget and 2016/17 projected budget
- 2015/16 statements of financial position

The audited financial statements show a district that is financially sound. One control deficiency was noted in reference to school generated funds, and there is evidence it is being addressed.

Several policies were reviewed dealing with the use of credit cards an area that can be problematic in a system as diverse and dispersed as Palliser School District. The policies and procedures appear sound and generally functional.

The documents outlining the 2015/16 budget and the projected 2016/17 projected budget as well as the statement of financial position (to Feb/16) are evidence of sound financial planning.

There was no detailed examination of various categories of the budget. Upon inquiry, assurances were provided from internal and external sources that the administrative expenditure levels were within Provincial guidelines.

Foundational Statements:

The document that provides the mandate and the basis for public education in the province is the *Alberta School Act*. The *Act* and its regulations provide a comprehensive description of powers and responsibilities of students, school Boards, teachers and the superintendent. Of particular relevance to the work of the review panel is Section 45(1) of the School Act:

> A Board has the responsibility to ensure that each student enrolled in a school operated by the Board and each staff member be employed by the Board to provide a welcoming, caring,

respectful and safe learning environment that respects diversity and fosters a sense of belonging.

In response to Section 45 (1) the Board has created a document entitled "Divisional Foundation Statements". This document outlines the mission, mandate, beliefs and values, and vision that captures the intent of the legislation. Of particular relevance is the first sentence of the vision:

Palliser Regional Schools is committed to engendering and supporting the values of the broader society - empathy, integrity, respect, trust and responsibility. The Vision under the subheading Leadership … requires effective leaders – leaders who are accessible by and attentive in their relationship with the members of the school community; leaders who are collaborative team leaders and problem solvers in a context of mutual respect…

This Division Foundational Statements also require the school district to commit to providing an emotionally and physically safe and supportive environment:

Personnel are required to model respectful behaviours..

… model good citizenship and caring and respectful behaviours

…learning and achievement is enhanced in an environment that is safe, respectful and welcoming to all

These visionary statements are intended to guide decision-making in the district and are directed toward all members of the district including the Board, central office administration, school employees, parent council members and students. There is a very logical connection between the School Act, the Division Foundational Statements and Board Policy.

Policy 12 is crucial when reviewing the evidence provided to the review panel: *The Superintendent is the Chief Executive Officer of the Board, and the Chief Educational Officer of the division…and is accountable to the Board for the conduct and operation of the division.* There is no ambiguity about the role of the Superintendent and the relationship with the Board, but it is not practiced in this way.

DISCUSSION

We have structured the discussion of our review around the key themes we identified in the interviews with stakeholders and their documentary submissions. Each theme relates in some way to the terms of reference for the panel, which included:

1. Organizational climate, culture, and leadership
2. Governance practices
3. Accountability to stakeholders, and
4. Internal and external communication practices.

Culture and Climate

Organizational culture is the pattern of basic assumptions that a particular group uses to cope with problems. There are three levels of culture:

- visible or tangible artifacts such as artwork or displays of employee photographs,
- espoused values, strategies, goals or philosophies typically found in documented policies and procedures, and
- unconscious assumptions that employees act upon but find difficult to articulate.

Organizational climate, on the other hand, is the prevailing atmosphere of the organization. It is the psycho-social environment and profoundly influences behaviour of employees.

Examining organizational culture can most effectively be done by outsiders who are not influenced by the underlying assumptions of the members of the organization. It normally involves an audit where information is gathered through observation, interviews with employees and analysis of organizational policies and procedures. Organizational climate is most commonly measured through employee perceptions.

The evidence we collected regarding culture and climate was intended to replicate standard research methods in this area of organizational research. It included data from a perception survey of over 350 current Palliser employees, interview data, reviews of relevant policies and procedures, as well as data with respect to employee turnover, absenteeism, and grievance or complaint filing. The terms of our contract prevented us from engaging in direct observation.

The qualitative and quantitative evidence that we were able to review is very consistent and clearly shows that there is a culture of fear and intimidation at Palliser. It is most evident at the leadership levels of the organization and has a significant impact on school administrators, senior leaders and Board Trustees. The culture at the top, however, is felt throughout Palliser. There are significant concerns with respect to:

- Organizational culture
- Clear leadership and expectations
- Civility and respect
- Workload management
- Balance
- Psychological protection.

The evidence indicates that employees in the Palliser School Division are experiencing bullying, intimidation and harassment on a regular basis. This is occurring despite policies designed to prevent it, and in spite of a clear vision and mandate that should ensure it is attended to for employees as well as students.

It is trite to say "that which gets measured gets done", but it is important to note that the standard indicators of problems with organizational culture and climate are not currently measured or analyzed at Palliser. The human resources data we were provided was limited, but consistent with the results of the survey and qualitative interviews. Turnover rates for school administrators and support staff are of concern and should be tracked and analyzed to better understand their causes and consequences. Absenteeism and leaves related to stress and illness should also be tracked and monitored.

The only assessment relevant to culture and climate, that we were told about, occurs during the annual review of the Superintendent. As noted earlier, this process is managed in such a way that those asked are afraid to provide constructive criticism. Confidentiality of the information is not maintained, so employees believe their responses will be tracked and they may be punished for their honesty.

The cultural situation and measurement challenges at Palliser are compounded by the Professional Code of Conduct for the ATA, which requires that employees _first_ approach the person who they feel is treating them in a bullying or harassing manner. There is no question that an individual who is being accused of bullying or harassment must be provided with that information. They should be given the opportunity to defend themselves if the allegations are very serious or change the behaviour if they are not aware of how it is perceived. However, this prevents many employees from seeking support from another manager, their union or the HR staff who might assist them in approaching the person they feel is bullying them. The ATA approach also suggests that filling out anonymous culture surveys may be a violation of the Code of Conduct. We would disagree, and argue that it is important that employees provide information to their organization about culture or climate issues that may require attention. So long as the data is gathered in a systematic way that does not malign specific individuals, participating is part of being a good organizational citizen. The alternative is to rely on formal employee complaints which enables the minimization of what might appear to be rare or uncommon incidents, and means the organization is only able to be reactive rather than proactive.

Furthermore, there is currently no effective system in place at Palliser that would provide guidance and support for an employee who feels bullied. Often the person engaging in the bullying is in a supervisory capacity and employees fear job loss and retaliation if they raise the issue with the bully. Everything they have experienced has told them this is the most likely outcome, so they stay silent. At this point, employees who might be willing to face their tormentor are forced to do it alone. If they speak about it to anyone else, they are labelled a coward.

It is beyond the scope of this review to evaluate the costs to Palliser of continuing on its current path. However, the evidence presented here, the amount of Board time, the money spent on legal counsel, and the distraction from the core function of the district should be sufficient to convince the leadership at Palliser that something must change. If not, there is a significant body of research that indicates there will be long term health effects for employees, increasingly negative impacts on performance and escalating costs related to legal action, turnover, absenteeism and conflict management. Eventually, it will impact the students, if it has not already done so.

Changing organizational culture at Palliser will not be easy, and will require a global and sustained effort. It has been suggested that culture change is a 4-10 year process. The primary mechanisms transmitting and changing culture are through the leaders of the organization:

1. What leaders pay attention to, measure and control on a regular basis.
2. How leaders react to critical incidents and organizational crises.
3. How leaders allocate scare resources.
4. Deliberate role modeling, teaching and coaching.
5. How leaders allocate rewards and status.
6. How leaders recruit, select, promote and excommunicate.

Secondary mechanisms include:

1. Organization design and structure (e.g. decision-making authority, coordination, reporting).
2. Systems and procedures (e.g. performance appraisal systems).
3. Design of physical space and transmission of organizational stories.
4. Formal statements of philosophy.[19]

In order to successfully effect change, Palliser will need to consider each of these mechanisms and develop a comprehensive culture change plan.

Conflict of Interest in Hiring

We found no evidence to suggest that the individuals hired into senior leadership positions at Palliser were hired because of their personal relationships. However, there remains a persistent public perception that this is the case. There are legitimate concerns that close personal/family relationships within the senior leadership team create a situation where there may be undue influence over organizational decision-making, where the flow of information upward through the organization is stifled or whitewashed so that it does not reflect negatively on senior leaders. It also creates a particular challenge with respect to neutral investigations when there are complaints about more senior members of the school division who also supervise the investigator.

Conflict of interest can be defined as "a situation in which a person, such as a public official, an employee, or a professional, has a private or personal interest sufficient to appear to influence the objective exercise of his or her official duties."[20] Conflicts of interest that interfere with professional responsibilities by affecting objective, professional judgment, as noted above, are a matter of legitimate concern. Examples of conflicts of interest include:

1. Using a public position to advance personal interests.
2. Accepting bribes or other benefits.
3. Influence peddling to unfairly advance the interests of another party
4. Using employer property for private advantage

Conflicts of interest can arise in any workplace and are most often be managed by declaring the conflict and absenting oneself from the decision-making process. This is what we were told occurs, and what

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[19] Schein, E.H. (1985). Organizational culture and leadership. San Francisco: Jossey-Bass Publishers.
[20] McDonald, M. Ethics and conflict of interest, http://ethics.ubc.ca/peoplemcdonaldconflict-htm/.

Palliser procedure 401 was outlined above and clearly states Palliser's philosophy as well as specific activities that are prohibited where family members work together. However, this appears to be insufficient as a mechanism for assuring the public that appropriate measures are in place. There remains a perceived conflict of interest which is a particular problem in a public organization.

It was also noted in our interviews that refusing to hire someone based on family status could be a violation of human rights legislation. Alberta's Human Rights Code does prohibit discrimination based on family status. Therefore the blanket application of an anti-nepotism policy is unlikely to be acceptable. However, discrimination may be justifiable in certain circumstances. More specifically, in order to justify discriminating against a job applicant based on family status, Palliser would need to be able to demonstrate that the particular application of its anti-nepotism policy:

- is rationally connected to the functions of the job performed;
- was established honestly and in the good-faith belief that it was necessary to fulfill a legitimate objective;
- is reasonably necessary to accomplish the goal or purpose, and that it is impossible to accommodate the family relationship without causing undue hardship to the organization.[21]

As this discussion suggests, this is a complicated issue with potential legal implications that cannot be taken lightly. Palliser should be keeping all records related to all hiring, but particularly when an applicant has a family relationship with an existing employee. This will enable Palliser to explain the rationale for the final selection to the candidates as well as if the hire becomes the subject of a grievance or human rights action. These records should include how the job was advertised, the exact language of the job advertisement, the <u>minimum qualifications</u> for the position (not just the ideal candidate profile), the names of those on the selection committee, the questions that were asked and the responses of all applicants (a numeric rating system is an effective way of ensuring a fair and unbiased process), as well as the rationale for the final decision.

Ineffective or Unfair Performance Management

The first issue we see with Palliser's approach to managing performance is the application of a theory that was intended to be used with children and is not appropriate for motivating highly skilled and capable adults. We could find no research to support its use for managing the performance of adults. The use of the Zone of Proximal Development (ZPD) has been misapplied and does not reflect any current or well-researched theory of adult motivation[22]. This shows up in school goals meetings in particular, where we were told the intent is to make people feel uncomfortable in order to push them toward stronger performance. There is absolutely no theory of motivation that would support this approach. Virtually every psychological theory of motivation with any evidence to support its use indicates that employees require feedback be provided in a supportive environment. There is ample evidence that high demands combined with a low level of control contribute to stress, which over the long term will have implications for job satisfaction, performance, and employee health.

The use of school goals meetings to provide feedback is appropriate, but the environment in which it occurs is not. School administrators should be provided with notice regarding the questions that will be

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[21] British Columbia (Public Service Employee Relations Comm.) v. B.C.G.E.U. (1999), 35 C.H.R.R. D/257 (S.C.C.)
[22] For example, goal setting theory, reinforcement theory, expectancy theory, equity theory.

asked, so that they are able to adequately prepare for the discussion. At no time is it appropriate to belittle when providing feedback. Furthermore, holding individuals responsible for events or outcomes over which they have no control is problematic and contributes to unnecessary stress. It is our understanding that this may occur on some occasions, when there is heavy reliance on aggregated student performance data. The use of the data in and of itself is helpful. However, there may be circumstances where a drop in scores can be explained by a particular development in the school. Administrators must be provided the opportunity to explain factors influencing the data. Explanations should not be denigrated and brushed off as "excuses". Subsequent problem solving should be collaborative, rather than in the form of corrective actions issued as a directive of the senior leadership team.

In contrast to the feedback mechanisms of the school goals meeting, it is the opinion of the panel that the existing procedures for performance evaluation of teachers and school administrators are generally appropriate. There is a need for some consistency with respect to the process and documents that are used at Palliser, but we believe this is underway. In general, we agree that the current system enables teachers and administrators to identify goals and objectives that are relevant to them, and also meet organizational goals. Nonetheless, there is a good deal of research about effective performance management systems that might benefit Palliser and should be considered as they continue to improve their processes, and to ensure performance evaluation does not become onerous for those involved.

The second issue with respect to Palliser and performance management is that there appears to be no system of progressive discipline in place that ensures that organizational responses to disciplinary offenses are proportionate, and clear to the employees involved. As noted in our results, Palliser seems to have an "all or nothing" approach to managing issues that arise with respect to the performance or discipline of employees. Teachers, for example, are placed on performance improvement plans without any clear indication of the level of performance concern that would initiate this action. There is no distinction between relatively minor performance issues, and those that could result in serious sanctions against the employee. A progressive discipline plan is also important for managing complaints of harassment or bullying and other forms of misconduct.   The following excerpt from a text on employment law briefly explains the concept of progressive discipline:[23]

> The practice of progressive discipline first arose in unionized workplaces, but is now common in many non-unionized workplaces as well. It is based on the idea that discipline for less serious infractions should be imposed in a series of increasing steps. For example, where an employee is absent from work without leave, an employer may be required to give a verbal warning for a first occurrence, a written warning for a second occurrence, and suspensions of increasing lengths for subsequent occurrences. Each of these steps must be documented. If the misconduct continues despite these disciplinary actions, an employer may eventually be entitled to dismiss the employee for cause.

> Generally speaking, when applying its progressive discipline policy, the employer considers the type of misconduct, as well as any previous misconduct, the discipline applied, and the length of

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[23] Williams-Whitt, K , Begg, M., Harris, T and Filsinger, K. (2016). *Employment Law for Business and Human Resources Professionals: Alberta and British Columbia, 3rd Edition*. Emond Montgomery Publications, Toronto.

time over which all of the incidents took place. The level of discipline must be proportionate to the employee's misconduct. An employer may skip steps in the disciplinary process as long as the policy allows it this discretion and the incident is sufficiently serious to warrant this action.

We could find no progressive discipline policy or procedure, nor could we find any relevant sections of current collective agreements. This is quite surprising in an organization as large and diverse as Palliser. It is important that any progressive discipline system be developed with the collective agreements in mind, to ensure the policy and procedure are in compliance with them and with other relevant legislation.

At this point, we feel it is necessary to make a comment regarding human resources management at Palliser.

Redaction - Section 17(1) of the *FOIP Act*

We are aware that it is common practice in school districts and that the preference is for applicants to possess an education degree. However, HR is a highly specialized area that requires extensive knowledge of law, research methods, data analysis, performance management, staffing and other specific knowledge domains. We believe that Palliser should support its HR staff in acquiring the appropriate education in HR. We also believe this is part of the reason common HR policies, procedures and measurement practices are not being utilized at Palliser.

The third concern we have is with respect to evaluation of the Superintendent at Palliser. At the most basic level, the criteria and methods used to evaluate the Superintendent do not adequately address the obligation to create a safe and caring environment for employees. If the Palliser Board wants to change the culture and environment for its employees, it will need to take ownership of the Superintendent evaluation process. Having it facilitated by an expert from the ASBA is not inappropriate, but cannot be a reason to abdicate responsibility. The Board should evaluate the process they are using, the criteria and measures they are using, as well as the way they are gathering information about the Superintendent's performance. They need to question the current system of cascading evaluations to ensure it meets their needs and does not create bias, which is a concern when the supervisor evaluates the subordinate and the subordinate's evaluation then becomes part of the supervisor's evaluation.

Inappropriate Employee Monitoring

We did not find evidence that Palliser was inappropriately monitoring employee email. Although it should be noted that a thorough examination of electronic communications would not have been appropriate without a formal complaint and was therefore not completed. Our discussion is therefore based on the persistent belief within Palliser that this is occurring. We felt it was important to address this issue because it is a factor feeding into the culture of fear and mistrust.

First, it is important to recognize that it is within the rights of the Palliser School Division to engage in the surveillance of activity on computers owned by the division.

What our review revealed, however, is that the current policies and procedures do not clearly identify the purpose or extent of electronic monitoring that may occur. Employees have a legitimate

expectation of privacy on workplace computers[24] because they are often used for personal purposes. Employers, should therefore be very clear about the way electronic activity may be monitored, why it will be monitored, what the information gathered will be used for, and who will have access to it. There should also be a complaint process in place if an employee feels that their private information has been accessed inappropriately. The employer's access to the information on employee computers must be:

- necessary to meet a specific need
- effective in meeting the need
- proportional to the benefit they gain
- and involve the least invasive approach possible

Finally, it should be made clear to employees that the information found can be used for discipline, and they should be reminded of the electronic monitoring policies and procedures on a regular basis.

Ineffective Complaint Handling and Investigation

As noted in our results, the perception that complaint handling and investigation at Palliser is ineffective arose from all stakeholder groups. The key concerns are with respect to minimizing the seriousness of complaints before they are investigated, and procedures for complaint handling that are unclear or perceived as biased. Our findings suggest that there are some policy gaps that can help correct some of these perceptions, and a larger issue with respect to complaint processes that also needs attention.

The most persistent public complaints are with respect to purchasing alcohol, personal use of Palliser vehicles, and the off-duty conduct of some Palliser employees.

We have no reason to believe that alcohol is being purchased indiscriminately with Palliser funds. However, Palliser does need to develop a policy that clarifies for employees when the purchase of alcohol is and is not permitted, and when it will or will not be reimbursed.

Similarly, we have no evidence showing that Palliser vehicles are being used indiscriminately for personal purposes. However, there is also no policy explaining permitted and prohibited use. 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.

The concern that the public has with respect to the off-duty conduct of Palliser employees is something that might also be managed, in part, through policy development. We would emphasize here that we did not conduct an investigation into specific allegations. Our recommendations are based on a public perception that this is occurring, that complaints have been made, but that little has been done to address those complaints.

Conduct that takes place outside the workplace in general does not provide just cause for discipline. However it will if an employer can demonstrate that the employee's off-duty conduct harmed its reputation. An off-duty conduct policy should include:

1. a statement of the purpose of the policy

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[24] R. v Cole 2012 SCC 53.

2. a description of when off-duty conduct will be considered a work-related matter, this would normally include conduct that
   a. harms the organization's reputation
   b. result in the employee being unable to perform his or her job effectively
   c. leads other workers to refuse or be reluctant to work with the employee
   d. makes it difficult for the organization or direct its workforce effectively
3. a statement that violations of off-duty conduct standards will result in discipline up to and including termination
4. a statement that employees have a duty to report legal charges against them that could impact their ability or qualifications to perform their jobs (e.g. *Criminal Code* charges)

Any off-duty conduct policy should include a process for appeal, and should refer to a progressive discipline policy to ensure that the employer's reaction to reports of inappropriate off-duty conduct is measured and appropriate.

We would reiterate here that any policies developed and administered by Palliser should be done so: a) in a way that is reasonable, b) clear and unequivocal, c) and with the relevant collective agreements in mind. The policy should be consistently enforced from the time it is introduced, and the policies should be brought to the attention of the employees before they are implemented.[25]

The somewhat more complex issue that Palliser should address is the perception that their complaint processes are ineffective and/or biased. To deal with this issue, Palliser will need to create a public complaint process that is transparent, easy to find on the Palliser website, and that includes a way of "closing the loop." In other words, there needs to be a mechanism for complainants to be reassured that their concern was reviewed thoughtfully and carefully, by the appropriate person, and that corrective action was taken where it was warranted. In many of these instances, particularly in regard to HR issues, the complainant may not have the right to know exactly how the issue was resolved. If progressive discipline was applied, this is a matter that is confidential. Confidentiality does not prevent the organization from following up with the complainant to provide the information that an investigation is being conducted, and contacting them again when the process is complete. The process should also include a method of tracking to ensure this type of follow-up has occurred, and to enable the organization to analyze the nature and outcome of complaint investigations.

To reduce the perception of bias, it may be appropriate to hire an external investigator for some types of complaints. This might be necessary when the investigation is into the activities of a more senior member of the leadership team, if there is a high risk of legal action, or when it involves a particularly sensitive issue such as sexual harassment or discrimination. An investigator cannot investigate someone who would normally be the investigator's supervisor.

Whether the investigation is conducted by someone internal to the organization who is well-trained and experienced, or whether it is conducted by an outside expert, the person conducting the investigation *should not be the person* making the decision about any disciplinary action that may arise from the investigation.

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[25] Communications, Energy and Paperworkers Union of Canada, Local 30 v Irving Pulp and Paper Ltd., [2013] 2 SCR 458, 2013 SCC 34.

The current situation at Palliser is extremely sensitive to this particular issue. Due to the culture of fear and mistrust, the precautions above may be insufficient. It may be necessary, for at least the foreseeable future, that a complaint resolution process be created that is completely external to the current organizational hierarchy at Palliser. We are suggesting that in order to reassure employees that their complaints will be handled in a confidential and appropriate manner, Palliser may wish to create a temporary, independent position for an adjudicator who would act as an ombudsperson for the district.

Micromanagement

A frequently heard comment in our interviews was that Palliser is micromanaged. Many participants felt that virtually all decisions are required to follow the chain of command "everything has to go through the Superintendent". It was recognized this was beneficial for needs-based budgeting, but it was felt that this has been taken to an extreme level so that even the smallest decisions must be approved centrally. We were told by many that Principals have little say in how they manage their schools anymore. School administrators were sometimes unclear about which issues they needed to ask or inform the Superintendent about, and when they should act independently.

The biggest concerns were related to the very specific pedagogical requirements determined by senior leadership that some of the people we interviewed felt were not always the most effective. This was highlighted as a particular concern given the broad diversity in Palliser, which includes many faith-based schools, colony schools, and alternative programs.

We did not conduct a thorough assessment of the decision-making processes within Palliser, nor did we examine the pedagogical demands put in place by the leadership team, so we cannot evaluate whether or not micromanagement in fact occurs at Palliser. We do highlight it as a concern of Palliser employees, and would encourage Palliser to review the approach they are taking. The current level of control is not motivating school administrators or their teachers and may not be sufficiently flexible. It is also evident that roles and responsibilities are not entirely clear for people in the system. It would be beneficial for Palliser to make the degree of authority for school administrators and related reporting requirements more explicit.

Managing diversity in a growing organization is a challenge that will be difficult to balance. However there appears to be a willingness to examine current practice. This could be a valuable exercise from a number of perspectives. It could help build trust. It could create better working teams at the school level and perhaps create efficiencies at central office where there is some perception that the growing number of administrative staff are focused on controlling rather than leading and facilitating. It may be time to loosen the reins to encourage creativity and support the unique benefits of Palliser's diverse system.

Stifled Internal Communications

One of the main terms of reference for the panel was to review the communications at Palliser. We could easily have spent the entire review examining the quality and quantity of communications to external stakeholders, and done the same for internal communications. Instead, interviews with stakeholders took us in very specific directions. We were told that on the whole, external communications are well done. Palliser has attempted to celebrate their achievements, but this has had less impact than hoped. The focus remains on what is going poorly in the division. This is not easy to

resolve, but it is our view that Palliser's reputation will mend over time if it takes action to deal with the challenges we identify in this report. The very best advertising for Palliser will be the testimony of their own employees. When those who work for the organization, or who choose to exit, still have positive things to say, Palliser will have evidence that their efforts are making a difference.

At this point in time, Palliser must focus their efforts on repairing internal communications. Our review has shown that there is a deep underlying assumption at Palliser that any dissenting voice or complaint is from someone with a personal vendetta. Complaints are disregarded as an exaggeration of the facts, or an inaccurate perception on the part of the person expressing the concern or making the complaint. If you don't agree with what Palliser is doing, you can get out of the organization. This is a large part of the reason Palliser is in the situation it is in today. It means Palliser has not heeded the signals it has been getting for several years. Complaints have been ignored or discounted.

The downward flow of communication means senior leaders do not hear the ideas that the talented and engaged group of people who work throughout Palliser can provide. They don't ask why people are leaving the organization, whether their employees are unhappy, or why they might not be. Criticism of the organization or senior leaders is viewed as inappropriate, and stakeholders who challenge the prevailing wisdom are presumed to have nothing valuable to add to the conversation.

This stifling of dissenting views has contributed to the conflict that plagues Palliser Board meetings. Poor communication, inaccurate information and ambiguity are key sources of workplace conflict. Not all conflict is bad, but when it further inhibits communication, causes people to devalue the work of others, affects morale or impacts an organization's ability to achieve its goals, it must be managed.

To improve the quality of communication in Palliser, efforts must be made to address the current lack of trust among Board members and between the Board and senior administrators. Leaders will need to learn how to direct conflict and prevent personal attacks. They must acquire the skills to lead by example, encouraging others to question and debate their ideas. A single approach to conflict is not appropriate in all circumstances, and leaders will need to build their skill level so they can recognize which method of resolution is appropriate in each circumstance.

Ineffective Board Operations and Governance

Board governance is hard work. But hard work alone is not sufficient; it will not automatically lead to an effective Board.

There is a great deal of informative literature covering the theory and practice of Board governance. Board members must be prepared to study the literature and combined with their experience and knowledge of the organization to be governed, and the context of the organization find a suitable model. There is no agreement in the literature or in practice that recommends the best model.

Initially a Board must engage in a process to decide what position is most suitable for them on the policy governance continuum, where a pure operating model is at one end and a pure policy model is at the other. The particular internal and external environment will dictate what else will influence the model chosen, such as the stage of the life and the current challenges being faced by the organization. For example severe financial or political stress may require the Board to have more direct contact with some operational area.

Several aspects of Board governance must be kept in mind. While developing the best model to suit your circumstances.

- o There are certain duties of Board members that must be carried out regardless of the particular governance model developed. Hugh M. Kelly Q.C and Mark R. Fredrich outline and provide an in-depth discussion of the duties in their publication: *Duties and Responsibilities of Directors of Non-Profit Corporations.* The duty of knowledge, care, skill, prudence, delegation and fiduciary duty are according to Kelly and Fredrich are non-negotiable.

- o To govern effectively under a predominantly policy governance model, the roles and responsibilities must be clearly defined and communicated so that Board Members, staff and the public are aware. This is an iterative process. The Board must be evaluating, reviewing and updating the roles and responsibilities on an ongoing basis to keep up with changing circumstances and to ensure clarity.

In the final analysis governance is about leadership and that includes the often forgotten dimensions of monitoring and evaluation. There is no one model to suit all circumstances. Even when the decision is made to adopt a policy governance model as the way forward there are many variations. When a particular variation is selected, it should be constantly updated, and revised to adjust to changing circumstances.

A regular focus on the governance model and respective roles of the Board and Superintendent keeps the relationship dynamic, but well-understood. The role of the Superintendent is interactive as the Superintendent is guided by the Board but also guides the Board. This crucial relationship is vital for the success of the organization. Unfortunately, it is often delegated to the Board Chair. However, in the public sector it is crucial that the relationship be with the entire Board. Yes the Board Chair has a special role but the sound relationship must be with the Board.

Changing circumstances may also include the introduction of new board members. Our electoral process determines who those Board members will be. New members often arrive with new ideas, but perhaps little understanding of the governance system and practices at that particular organization. Thus careful attention must be paid to the orientation of new members. These new members represent changing circumstances that affect the governance dynamic. The orientation must include a thorough and complete understanding of the governance model in effect, and very importantly the orientation should allow for the new member to introduce new ideas and values. Seasoned Board members must welcome the new Trustees, help them understand the history around the issues that the organization is facing, but also support real opportunities to contribute. The experience of adding new members must be viewed positively and not as a threat to the status quo. The purpose of the Board is to reflect the wishes of the electorate and the electorate has provided new members, thus it must be viewed as an opportunity for renewal and fresh thinking, if the Board is to act as a team.

Board needs and changing circumstances can be misunderstood by a Superintendent and leadership team. When this occurs, the focus shifts to keeping the Board out of the "Superintendent's sandbox" and threats of "constructive dismissal" arise. As we have seen in Palliser, this results in a diminishing role for the Board and continuing and escalating frustration. Boards must be allowed to do the work they have been entrusted by the public to do. This means they may need to interact with employees. This must be supported through a clear policy frame work that guides those interactions in a positive way. A

policy framework built on control versus trust is doomed to be misunderstood, and to fail as it has in Palliser. Similarly, the senior leadership team in a school division must be allowed to do the jobs they've been hired to do. To support this balance, as a good Board member "you must put your nose into the operations but keep your fingers out."

CONCLUSION AND RECOMMENDATIONS

The following recommendations flow from the information we were able to gather for the review. We have attempted to be both comprehensive and balanced. We hope that the recommendations can help Palliser to move forward in a positive and constructive way.

1. The Palliser School Division must create a comprehensive and systematic plan to address the culture of aggression and fear that is being experienced by many employees. Organizational leaders must be committed to this process and it must be made a priority. It will require a global and sustained effort that includes action that attends to the most common mechanisms of culture change. Palliser should ensure they:
   a. hold all members of the organization accountable for their actions, and in particular ensure that managers/leaders are held accountable to the same or higher standard;
   b. include culture and climate criteria and measures in the performance evaluation of all supervisors;
   c. create a respectful work environment where values of honesty, tolerance and fairness are modeled, encouraged and reinforced through evaluation and reward systems;
   d. engage staff in maintaining an environment that promotes open and clear communication that reduces the opportunity for misunderstanding;
   e. ensure meaningful participation in the development of organizational mission, values and codes of ethics;
   f. provide training to all staff on effective communication and conflict management;
   g. communicate explanations for decisions and ensure respect, sincerity, care and empathy when the implications of decisions may be seen as negative by some employees;
   h. prominently display the language of Palliser documents and policies that incorporate the values of respect, trust, honesty and fairness;
   i. integrate values in policies and procedures that guide organizational decision-making; and
   j. measure progress by conducting regular anonymous assessments to understand the organizational climate and culture at Palliser.

2. The 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. This will require:
   a. identification and mitigation of psychological hazards associated with specific occupations in Palliser (e.g. job demands analyses);
   b. training and development to help employees recognize psychosocial stressors and cope with them;
   c. providing incentives to reinforce behaviours that are psychologically health and safe;
   d. ensuring organizational justice across all facets of the workplace;
   e. ongoing awareness and communication;
   f. provide support for employees who have experienced work-related harassment, discrimination or violence;

g. conduct regular risk assessments and reviews to understand and monitor factors that may be negatively affecting employee's psychological health and safety; and

h. regularly reviewing and modifying policies to reflect emerging case law and regulatory changes.

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 behaviours 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 to learn how to manage interpersonal conflict and prevent personal attacks. A single approach to conflict is not appropriate in all circumstances, and leaders will need to build their skill level so they can recognize which method of resolution is appropriate in each circumstance.

5. The 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. We would encourage the Board to review the current system of cascading evaluations to ensure it meets their needs and does not create bias.

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 (including disciplinary 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.
   a. It must include a clear path for members of the public who wish to file a complaint.
   b. It must provide a safe mechanism for employees to report episodes of bullying, without having their experiences minimized.
   c. The process must prohibit and specify penalties that may be applied if there is retaliation for reporting an incident or participating in an investigation.

d. The process must ensure employees have support when they are ready to bring the behaviour to the attention of the bully or make a formal complaint.

e. The process should include a mechanism to report back to the individual filing a complaint that maintains confidentiality, but assures the complainant that the issue has been appropriately investigated.

f. To reduce the perception of bias, the process should specify when Palliser will hire an external investigator.

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. To support this, current staff should be provided with appropriate HR education and encouraged to pursue the CPHR designation.

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 (KSAOs);
    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 actions (normally beginning with a verbal warning and ending in dismissal). The employer's response must be proportionate to the nature and degree of misconduct. Therefore the policy should:
    a. consider the nature and seriousness of the misconduct;
    b. the frequency or length of time over which the misconduct occurred;
    c. any previous discipline;
    d. any prior efforts to improve to correct the employee's behaviour or improve the employee's performance;

e. whether the employment relationship can be saved; and

f. allow the employer to skip steps in the event that the misconduct is sufficiently serious.

g. A process for appeal.

13. Palliser School Division should develop an off-duty conduct policy that applies to all employees and includes:

a. a statement of the purpose of the policy;

b. a description of when off-duty conduct will be considered a work-related matter, this would normally include conduct that:

   i. harms the organization's reputation;

   ii. results in the employee being unable to perform his or her job effectively;

   iii. leads other workers to refuse or be reluctant to work with the employee;

   iv. makes it difficult for the organization or direct its workforce effectively;

c. a statement that violations of off-duty conduct standards will result in discipline up to and including termination;

d. a statement that employees have a duty to report legal charges against them that could impact their ability or qualifications to perform their jobs (e.g. *criminal code* charges);

e. a process for appeal; and

f. reference to the progressive discipline policy to ensure that the employer's reaction to reports of inappropriate off-duty conduct is measured and appropriate.

14. Palliser School Division should develop a more transparent and specific electronic monitoring policy. The policy should ensure Palliser is taking the least invasive approach possible. It should:

a. be very clear about how electronic activity may be monitored,

b. why it will be monitored,

c. what the information gathered,

d. what it will be used for, and

e. who will have access to it.

Employees should be reminded of the monitoring policy at least annually. It should be made clear that the information found during monitoring may be used for disciplinary purposes. There should be a complaint process in place if an employee feels that their private information has been accessed inappropriately.

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 the agenda 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. The Board should reconsider the nature of current reporting from senior leadership that will enable Trustees to focus on important Board tasks.

18. It is recommended that Palliser Board of Trustee meeting time be set aside for Board professional development. This professional development agenda should be created by the Board members and be in addition to services provided by the Provincial associations or government. This should be ongoing and begin with a thorough orientation and mentorship of new Board members so they become contributors as soon as possible. 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 annual Board evaluations.

19. In order to better support Board operations, we would recommend that the Palliser Board of Trustees Board 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 from this report that they have accepted, as well as their progress in implementing the recommendations.

This concludes our review and report. We have provided a series of recommendations and it is now up to the Board and senior leadership within Palliser to address the challenges raised. We would like to close by recognizing that this report makes it appear that Palliser is not functioning well in any area. This is not true, there is much that is positive of which the district can be proud, including for example, the survey results for employee engagement and accountability pillar results in Appendix K. We hope that these successes and our recommendations form the foundation for a stronger organization in the future.

APPENDIX A

Kelly Williams-Whitt, ND, MBA, PhD
Associate Professor
Area Chair, Human Resources and Organizational Studies
Curriculum Vitae

Education

Doctor of Philosophy: Labour Relations and Human Resource Management, Haskayne School of Business, University of Calgary, *2004*
Master of Business Administration: Haskayne School of Business, University of Calgary, *1999*
Nursing Diploma: Foothills Hospital School of Nursing, *1984*

Professional Areas of Interest

Teaching: Human Resource Management, Labour Relations, Labour & Employment Law, Occupational Health & Safety, Organizational Behaviour, Diversity, Social Responsibility
Research: Return to Work and Disability Accommodation, Labour and Employment Law, Social Capital, Dismissal and Reinstatement, Duty of Fair Representation

Dissertation

Accommodating Disability in the Workplace

Peer Reviewed Publications

Williams-Whitt, K; Bultmann, U; Amick III, B; Munir, F; Tveito, TH; and Anema, JR (2016). Workplace interventions to prevent disability from both the scientific and practice perspectives. A comparison of scientific literature, grey literature and stakeholder observations. *Journal of Occupational Rehabilitation.* DOI:10.1007/s10926-016-9664-z.

Kristman, VL; Shaw, WS, Reguly, P; **Williams-Whitt, K**; Soklaridis, S.; Loisel, P. (2016). Supervisor and organizational factors associated with supervisor support of job accommodations for low back injured workers. *Journal of Occupational Rehabilitation.* DOI: 10.1007/s10926-016-9638-1.

Williams-Whitt, K; Kristman, VL; Shaw, WS; Soklaridis, S; Reguly, P (2016). A model of supervisor decision-making in the accommodation of injured workers. *Journal of Occupational Rehabilitation,* 26 (3), 366-381.

Gross, DP; Armijo-Olivo, S; Steenstra, I; Shaw, WS; **Williams-Whitt, K**; Shaw, N; Hartvigsen, J; Woodhouse, L; Qin, Z; and Ha, C (2016). Clinical decision-support tools for managing

disabling musculoskeletal disorders: A scoping review.   *Journal of Occupational Rehabilitation,* 26 (3) 286-318.

McGuire, C; Kristman VL; Shaw, W; Loisel, P; Reguly, P; **Williams-Whitt, K**; Soklaridis, S. (2015). Supervisors' perceptions of organizational policies are associated with their likelihood to accommodate back injured workers. *Disability and Rehabilitation*, 25 (3) 589-598.

White, MI; Dionne, CE; Warje, O; Koehoorn, M; Wagner, SL; Schultz, I; Koehn, C; **Williams-Whitt, K;** Harder, HG; Pasca, R; Hsu, V; McGuire, L; Schulz, W; Kube, D; Wright, MD (2016). Physical activity and exercise interventions in the workplace impacting work outcomes: A stakeholder-centred best evidence synthesis of systematic reviews. *International Journal of Occupational and Environmental Medicine* 7-2: 61-74.

Wagner, SL; Koehn, C; White, M; Harder, H; Schultz, I; **Williams-Whitt, K**; Warje, O; Dionne, C; Koehoorn, M; Pasca, R; Hsu, V; McGuire, L; Lama, I; Schulz, W; Kube, D; Hook, A and Wright, D (2016). Mental health interventions in the workplace and work outcomes: A best-evidence synthesis of systematic reviews. *International Journal of Occupational and Environmental Medicine.* 7-1: 1-14.

Wagner, SL; White, MI, Schultz, IZ; **Williams-Whitt, K**; Koehn, C; Dionne, CE; Koehoorn, M; Harder, HG; Pasca, R; Warje, O; Hsu, V; McGuire, L; Lama, I; Schulz, W; Kube, D; and Wright, MD (2015). Social support and supervisory quality interventions in the workplace: A stakeholder-centred best-evidence synthesis of systematic reviews on work outcomes. *International Journal of Occupational and Environmental Medicine* 6-4, 189-204.

Williams-Whitt, K; White, MI; Wagner, SL; Schultz, IZ; Koehn, C; Dionne, CE; Koehoorn, M; Harder, HG; Pasca, R; Warje, O; Hsu, V; McGuire, L; Lama, I; Schulz, W; Kube, D; Hook, A and Wright, MD (2015). Job demand and control interventions: A stakeholder-centred best-evidence synthesis of systematic reviews. *International Journal of Occupational and Environmental Medicine* 6-2, 61-78.

McGuire, C; Kristman, VL; Shaw, WS; **Williams-Whitt, K**; Reguly, P and Soklaridis, S (2015). Supervisor Autonomy and Considerate Leadership Style are Associated with Supervisors' Likelihood to Accommodate Back Injured Workers. *Journal of Occupational Rehabilitation*, 25-3: 589-98.

Shaw, WS; Kristman, VL; **Williams-Whitt, K**; Soklaridis, S; Yuang, YH; Cote, P; and Loisel, P (2014). The Job Accommodation Scale (JAS): Psychometric evaluation of a new measure of employer support for temporary job modifications. *Journal of Occupational Rehabilitation*, 24-4: 755-765.

Kristman, VL; Shaw, WS and **Williams-Whitt, K** (2013). Supervisor's Perspectives on Work Accommodation for Chronically Ill Employees. In *Working Bodies: Chronic Illness in the Canadian Workplace,* Sharon-Dale Stone, Valerie Crooks and Michelle Owen (Eds). McGill Queens University Press.

Williams-Whitt, K (2012). Oil and Ideology: The Transformation of K-12 Bargaining in Alberta. In *Dynamic Negotiations.* Sara Slinn and Arthur Sweetman, Eds. School of Policy Studies Series, McGill-Queen's University Press.

Williams-Whitt, K and Taras, D (2010). Disability and the Performance Paradox: Can Social Capital Bridge the Divide? *British Journal of Industrial Relations,* 48-3: 534-559.

Williams-Whitt, K (2007). Impediments to Disability Accommodation. *Relations industrielles,* 62-3: 405-532.

Williams, K and Taras, D (2000). Reinstatement in Arbitration: The Grievors' Perspective. *Relations industrielles* 55-2: 227-48.

Peer Reviewed Conference Proceedings

Williams-Whitt, K (2008). Disability at Work and the Performance Paradox. *Proceedings of the 60th Annual Meeting of the Labor and Employment Relations Association.* New Orleans.

Williams, K and Taras, D (2004). Accommodating Disability in the Workplace: The Impact of Organizational Trust. *Conference Proceedings. Administrative Sciences Association of Canada.*

Books, Book Chapters and Book Reviews

Williams-Whitt, K , Begg, M., Harris, T and Filsinger, K. (2016). *Employment Law for Business and Human Resources Professionals: Alberta and British Columbia, 3rd Edition.* Emond Montgomery Publications, Toronto.

Williams-Whitt, K. (2016). Book Review: Gender and Leadership in Unions. Gill Kirton and G. Healy authors. *Equality, diversity and inclusion: An international journal.* Forthcoming.

White, MI; Wagner, SL; **Williams-Whitt, K**; Koehn, C; Kube, D; Conacchia, M and Warje, O (2015). Workplace intervention research: Disability prevention, disability management and work productivity. In *Handbook of Return-to-Work,* Izabela Schultz and Robert Gatchel (Eds).

Williams-Whitt, K (2013). Disability Management: The Social Capital Theory Perspective for Managing Disability Claims. In *Disability Management: Theory, Strategy and Industry Practice*, 5th Edition. Dianne Dyck, Ed. Butterworths.

McKay, G; Gaetz, B; Filsinger, K.J; Harris, T and **Williams-Whitt, K** (2012). *Employment Law for Business and Human Resources Professionals: Alberta and British Columbia, 2nd Edition.* Emond Montgomery Publications, Toronto.

Williams-Whitt, K (2012). Disability management: The social capital theory perspective for managing disability claims. In the *Disability Management Compliance Manual Release 4*, Dianne Dyck and Gowlings (Eds). Lexis Nexis, Canada.

Arnold, I; Dyck, D; Samra, J and **Williams-Whitt, K** (2011). Psychological safety and health in the workplace. In *Occupational Health & Safety: Theory, Strategy and Industry Practice*, Dianne Dyck, Ed. Lexis-Nexis, Butterworths.

Williams-Whitt, K and Taras, D Eds. (2010). *Perspectives on Disability in the Workplace.* National Institute of Disability Management and Research, Nanaimo.

Williams-Whitt, K (2010). The social capital of disability accommodation: Dealing with difficult cases. In *Perspectives on Disability in the Workplace.* National Institute of Disability Management and Research, Nanaimo.

Corey, D; Manchot, C and **Williams-Whitt, K** (2010). Disability advocacy: Fairness and equality one precedent at a time. In *Perspectives on Disability in the Workplace.* National Institute of Disability Management and Research, Nanaimo.

Williams-Whitt, K (2009). Disability management: The social capital theory perspective for managing disability claims. In *Disability Management: Theory, Strategy and Industry Practice, 4th Edition.* Dianne Dyck, Ed. Lexis Nexis, Butterworths.

Filsinger, K; Gaetz, B; McKay, G; **Williams-Whitt, K** and Harris, T (2008). *Employment Law for Business and Human Resource Managers in British Columbia and Alberta,* Emond Montgomery Publications Ltd.

Williams, K (2002). Review of *The Future of the Safety Net: Social Insurance and Employee Benefits.* Friedman, Sheldon and David C. Jacobs, eds. In *Relations industrielles* 57-3: 575-77.

Published Arbitration Decisions

Hamlil v. Hercules Forwarding ULC, [2016] C.L.A.D. No. 104

Reale v. Light Speed Logistics Inc., [2015] C.L.A.D. No. 189.

Hart v. Entrec Corp., [2014] C.L.A.D. No. 28.

643273 Alberta Ltd. (First Continental Freight Systems) v. Vassie [2012] C.L.A.D. No. 372.

643273 Alberta Ltd. (First Continental Freight Systems) v. McLean [2012] C.L.A.D. No. 361.

643273 Alberta Ltd. (First Continental Freight Systems) v. Laramee [2012] C.L.A.D. No. 388.

Kananaskis Mountain Helicopters v. Beaudoin [2011] C.L.A.D. No. 434.

Leask v. H & R Transport Ltd., [2011] C.L.A.D. No. 153.

Barrette v. International Compost Ltd. [2010] C.L.A.D. No 401.

643273 Alberta Ltd. (c.o.b. First Continental Freight Systems) v. Riley, [2010] C.L.A.D. No. 208.

Lockwood v. B & D Walter Trucking Ltd., [2010] C.L.A.D. No. 172.

Taylor v. Exalta Transport Services Ltd., [2009] C.L.A.D. No. 110.

Exalta Transport Services Ltd. v. Taylor, [2009] C.L.A.D. No. 111.

Reports

Gross, DP; Armijo-Olivo, S; Shaw, WS; **Williams-Whitt, K**; Hartvigson, J; Shaw, NT; Qin, Z; Ha, C; Woodhouse, LJ; Steenstra, IA (2015). *Clinical decision support tools for managing disabling musculoskeletal disorders.* Report to the Workers' Compensation Board of Manitoba Research and Workplace Innovation Program.

White, MI; Wagner, SL; Schultz, I.Z; Williams-Whitt, K; Koehn, C; Dionne, C.E; Koehoorn, M; Harder, H; Pasca, R; Wärje, O; Hsu, V; McGuire, L; Lama, I; Schulz, W; Kube, D; Hook, A (2014) *Interventions to reduce work absence: A best evidence synthesis of systematic reviews.* Report to WorkSafe BC, Project #: RS2011-1G36. Vancouver: Canadian Institute for the Relief of Pain and Disability.

Research in Progress

Williams-Whitt, K; Anema JR; Amick III, B; Munir, F; Tveito, H; Bultmann, U. Workplace interventions to prevent disability from both the scientific and practice prspectives: A review of the scientific and grey literature. Under Review: *Journal of Occupational Rehabilitation.*

Selected Presentations

Obtaining and Using Medical Evidence: A Hands-On Workshop. Lancaster House Labour Arbitration and Policy Conference, May 18, 2016.

Making IT Safe for Injured Workers, Their Managers and Peers. Keynote address at the FIOSA-MIOSA (Food Industry Occupational Safety Association- Manufacturing Industry Occupational Safety Association). 2015 Safety Conference, Burnaby, B.C.

Disability prevention for aging employees: A best-evidence synthesis of workplace wellness interventions. From Possibility to Practice in Aging, the 44th Annual Scientific and Educational Meeting of the Canadian Association on Gerontology. October 2015, Calgary.

Supervisors Perspectives on Accommodating Back Injured Workers: A Grounded Theory Study. Williams-Whitt K, Kristman V, Shaw WS, Soklaridis S, Loisel P. 3rd WDPI Conference:

Implementing Work Disability Prevention Knowledge. Toronto, Ontario. September 29th – October 1st, 2014 (Presentation)

A Stakeholder-Centred Best Evidence Synthesis of Systematic Reviews on Workplace Interventions Addressing Job Control and Demands. Williams-Whitt K, White MI, Wagner SL, Schultz IZ, Koehn C, Dionne CE, Koehoorn M, Harder H, Wärje O, Pasca R. 3rd WDPI Conference: Implementing Work Disability Prevention Knowledge. Toronto, Ontario. September 29th – October 1st, 2014 (Poster)

Health and Work Productivity Portal – Pilot-testing Online Academic Community Partnership Platform. White MI, Wagner SL, Schultz IZ, , Williams-Whitt K, Koehn C, Dionne CE, Koehoorn M, Harder H, Pasca R, Wärje O, Hsu V, McGuire L, Lama I, Schulz W, Kube D, Hook A, Cornacchia M. 3rd WDPI Conference: Implementing Work Disability Prevention Knowledge. Toronto, Ontario. September 29th – October 1st, 2014 (Poster)

*A stakeholder-centred best evidence-synthesis of systematic reviews on workplace interventions addressing physical activity and exercise.*White MI, Dionne CE, Wagner SL, Schultz IZ, Koehn C, Williams-Whitt K, Harder H, Pasca R, Wärje O, Hsu V, McGuire L, Lama I, Schulz W, Kube D, Hook A, Cornacchia M. 3rd WDPI Conference: Implementing Work Disability Prevention Knowledge. Toronto, Ontario. September 29th – October 1st, 2014 (Poster)

A Scoping Review of Clinical Decision Support Tools for Managing Patients with Painful Musculoskeletal Disorders. Gross DP, Armijo-Olivo S, Steenstra I, Shaw WS, Williams-Whitt K, Hartvigsen J, Ha C, Qin Z. 3rd WDPI Conference: Implementing Work Disability Prevention Knowledge. Toronto, Ontario. September 29th – October 1st, 2014 (Poster)

Bargaining Accommodation and Attendance Management Provisions. One-day workshop, Labour Arbitration and Policy Conference, Calgary, June 2014.

Does Changing Job Demands and Job Control Impact Work Absence, Work Productivity or Financial Outcomes? Creating and Sustaining Psychologically Healthy Workplaces: Learning from Research and Practice, Vancouver (June 2014)

A Best-Evidence Synthesis of Systematic Reviews on Workplace Disability: Job Demand and Control Interventions. Canadian Industrial Relations Association Conference, Brock University, May 2014.

The Job Interview for your Faculty Position. Panel presentation at the Administrative Sciences Association of Canada Doctoral Student Symposium, Calgary (June 2013).

Bargaining Accommodation & Attendance Management Provisions. Full-Day Preconference Workshop. Kelly Williams-Whitt (Workshop Leader), Catherine Sullivan (Union Council) and Wayne Balshin (Employer Council). Lancaster House Bargaining in the Broader Public Sector Conference, Vancouver (December 2012).

Dynamic Negotiations: Considering Teacher Bargaining in Canada. Panel and Book Chapter Presentation: Slinn, S., Williams-Whitt, K. Rose, J. and Sweeney B. 49th Annual Conference and Annual General Meeting of the Canadian Industrial Relations Association (May 2012).

Counterproductive Coping. (2012), Paper presentation at the 49th Annual Conference and General Meeting of the Canadian Industrial Relations Association (May 2012).

Social Capital and Return to Work. Paper presentation at the Alberta Occupational Rehabilitation Forum (May 2012).

Accommodating Mental Illness: Addressing the Issues at Work, During Leave, and on Return. Kelly Williams-Whitt (Workshop Leader), Tim Mitchell (Employer Counsel), and Dan Scott (Union Council). Full-Day Pre-Conference Workshop. Lancaster House Labour Arbitration and Policy Conference, Calgary (2011).

Disabled Employee Behaviours. Kelly Williams-Whitt. **Invited Keynote Address:** Next Step Conference, Calgary Health Region. June 2009.

Who Files Duty of Fair Representation Complaints and Why? Kelly Williams-Whitt. **Presented:** Canadian Industrial Relations Association Annual Conference, Gatineau, Quebec. May 2009.

Dealing with Medical Information: Balancing Privacy and the Need to Know. Kelly Williams-Whitt, Trisha Gain and Dan Scott. **Presented:** Labour Arbitration and Policy Conference, Calgary, June 2008.

Teaching Collective Bargaining: A New On-line Canadian Simulation. Kelly-Williams-Whitt. **Presented:** Canadian Industrial Relations Association Annual Conference, Vancouver, June 2008.

Disability at Work and the Performance Paradox. Kelly Williams-Whitt. **Presented:** 60th Annual Meeting of the Labor and Employment Relations Association in New Orleans, January, 2008.

Trust: An Explanatory Mechanism in Disability Accommodation Kelly Williams. **Presented:** Academy of Management, Atlanta, Georgia, August 2006.

Employers, Physicians and Agency in Disability: an Uncomfortable Affiliation. Kelly Williams. **Presented**: Canadian Industrial Relations Association Annual Meeting, University of Western Ontario, June 2005.

Accommodation of Disabilities in the Workplace. Kelly Williams. **Invited Keynote Address:** Human Resources Association of Calgary, Calgary, September 2004; City of Calgary International Day of Disabilities December 2004; Champions Career Centre, February 2005.

Accommodating Disability in the Workplace: The Impact of Organizational Trust. Kelly Williams and Daphne Taras. **Presented:** ASAC, Quebec City, Quebec, June 2004.

When Non-union Representation Systems Collide with Trade Union Laws: The Canadian Approach. Daphne Taras and Kelly Williams. **Presented:** Congress of the Social Sciences and Humanities, Canadian Industrial Relations Association Annual Conference, Quebec City, Quebec, May 2001.

Reinstatement in Arbitration: The Grievors' Perspective. Kelly Williams and Daphne Taras. **Presented:** Congress of the Social Sciences and Humanities, Canadian Industrial Relations Association Annual Conference, Edmonton, Alberta, May 2000. **Presented:** Labour and Arbitration Policy Conference, Calgary, Alberta, June 2000.

Graduate Student Supervision

Supervisor: Subomi Ibitoye, MSc Management, University of Lethbridge, Thesis title: *Personality Characteristics, Safety Motivation And Safety Participation: The Effect Of Safety Incentives*: Proposal in development.

Committee Member: Emma Jing, MSc Management, University of Lethbridge, Thesis title:*Antecedents of Employees' Organizational Embeddedness: The Role of Culture*. Proposal defense date: June 8, 2016.

Committee Member: Alison Gray, Doctor of Education in Higher Education Leadership, University of Calgary Werklund School of Education, *Entrepreneurialism in Alberta's Public University Business Schools: An Exploratory Sequential Mixed Methods Approach.* Proposal successfully defended August 26, 2014. Data collection in process.

Co-Supervisor: Zhanna Lyubyck, MSc Management, University of Lethbridge, Thesis title: *Perceived Disability Severity and Employee Outcomes: The Role of Leader-Member Exchange and Leader Empathy.* Thesis successfully defended Mar. 30, 2016.

Supervisor: Chiaki Koiki, MSc Management, University of Lethbridge, Thesis title:: *Peer Evaluations in Self-Managing Work Teams: The Role of Specific Emotions in Extra-Role Behaviours.* Thesis successfully defended Nov 29, 2010.

Research Grants:

2015	Research Grant	WorkSafeBC	$45,000
2012	Research Grant	WCB Manitoba	$88,085
2009	Research Grant	Canadian Institute of Health Research	$80,470
2008	Research Grant	University of Lethbridge	$6,000
2007	Seed Fund Grant	University of Lethbridge	$2,000
2005	Seed Fund Grant	University of Lethbridge	$2,000
2002	Research Grant	Industrial Relations Research Group	$2,400

Professional Experience

Director, Management Graduate Programs	2013-Present	University of Lethbridge
Associate Professor	2009-Present	University of Lethbridge
Labour Mediator and Arbitrator	2008-Present	K. Williams-Whitt
Assistant Professor	2003-2009	University of Lethbridge
MBA Coach	2008-2009	Athabasca University
Sessional Instructor	2001-2003	University of Calgary
Sessional Instructor	2001-2003	Mount Royal College
Research Assistant	1999-2003	University of Calgary
K. Williams Consulting	1997-2009	Calgary. Alberta
Canbell Leasing Property Management	1988-1997	Calgary, Alberta
RN Foothills General Hospital and Fox Creek Hospital	1984-1988	Alberta

Courses Taught

OHS	3rd/4th Year Undergraduate	University of Lethbridge
Employment Law	3rd/4th Year Undergraduate	University of Lethbridge
Labour Relations	MSc, 3rd /4th Year Undergraduate	University of Lethbridge, University of Calgary, Mount Royal University
Collective Bargaining	4th Year Undergraduate	University of Lethbridge
Labour Arbitration	4th Year Undergraduate	University of Lethbridge
Public Sector Labour Relations	3rd Year Undergraduate	University of Lethbridge
Conflict Resolution	Calgary Health Region	University of Calgary
Advanced HRM	4th Year Undergraduate	University of Lethbridge, University of Calgary
Advanced OB	4th Year Undergraduate	University of Lethbridge
HRM	MBA & 1st Year Undergraduate	Athabasca University, Mount Royal University
Diversity	3rd /4th Year Undergraduate	University of Lethbridge
Managing Responsibly in a Global Environment	3rd Year Undergraduate	University of Lethbridge
Organizational Theory	3rd Year Undergraduate	University of Lethbridge
Organizational Behaviour	2nd Year Undergraduate	Mount Royal University

Other Scholarly and Community Service Activities

Current Appointments:

- Chair, Occupational Health and Safety Education, Training Resources and Certification Technical Working Group, Farm and Ranch Safety, Government of Alberta.
- CIHR Peer Review Committee Member, Project Scheme: 2016 1st Live Pilot competition.
- Human Resources Institute of Alberta (HRIA) Post-Secondary Accreditation Committee Member.
- Director Management Graduate Programs, University of Lethbridge
- Adjudicator under Part III of the Canada Labour Code
- Personal Security Consultant (Mediator), University of Lethbridge
- Member of the Board of Directors of the Canadian Institute for the Relief of Pain and Disability
- Member of Faculty of Management Executive and School of Graduate Studies Executive, University of Lethbridge
- Member of the Editorial Board for the Journal of Occupational Rehabilitation
- Member of the Gender, Equity and Diversity Committee, University of Lethbridge Faculty Association
- Member of the Faculty of Management Search Committee
- Chair, Canadian Industrial Relations Association, Southern Alberta Chapter

Past Appointments:

- University of Lethbridge Teaching Fellow, Blended Learning (2013-2015)
- Member of the MBA Taskforce (2013)
- President, Canadian Industrial Relations Association (National Academic Organization) (2012-2014), Member of the Executive (2008-2012)
- Human Resources and Labour Relations Area Chair (appointed 2013)
- Member of the University of Lethbridge People Planning Taskforce (2012-2013)
- Chair of the Faculty of Management Grade Appeals Committee (2012-2013)
- Chair of the Salary, Tenure and Promotion Committee, and ad hoc area member (2011-2016)
- MSc Management Representative on Graduate Council for the School of Graduate Studies (2012-2013)
- Member of the HRLR Area Curriculum Review Committee (2011-2012)
- Chair of the CIRA National Conference in (2012), and Program Chair for the CIRA National Conference in (2011)
- Faculty of Management Representative on the University of Lethbridge Strategic Planning Committee (2010)
- Member of the Economic Benefits Committee, University of Lethbridge Faculty Association
- Member of the Master of Science Committee, Faculty of Management (2009)

- Reviewer for the Organizational Behaviour and Human Resource Management Divisions for the Academy of Management.
- Member of the University of Lethbridge Admissions, Awards and Graduations Committee.
- Co-chair of the Disability in the Workplace Symposium, June, 2006 at the 23rd Annual Labour and Arbitration Policy Conference.
- Member of the Board of Directors for the Ministro Humanitarian Foundation, an international organization providing humanitarian aid in the Phillipines.
- Member of the Steering Committee investigating Advanced Skills Shortages in the Oil and Gas Sector, for the Western Office for the National Partnership of Advanced Skills (WONPAS).
- National Examiner/National Tutor for the University of Calgary/Certified General Accountants Association of Canada, Bachelor of Accounting Science Distance Education Program, Course: MG1 Organization and Leadership (2005-2006).
- Coach for the University of Calgary Human Resources and Organizational Dynamics Student Team entered in the Excalibur Business Games at the University of Quebec in Montreal (2002).

TERENCE A. WENINGER

EDUCATION

Ed.D.	Arizona State University, Division of Educational Leadership and Policy Studies, Tempe, Arizona, 1987
M.Ed.	University of Alberta, Department of Education Administration, Edmonton, Alberta, 1975
B.Sc.	University of Saskatchewan, Saskatoon, Saskatchewan, 1971
B.Ed.	University of Saskatchewan, Saskatoon, Saskatchewan, 1968

PROFESSIONAL EXPERIENCE

2011 – Present **T. Weninger and Associates**
Provision of consulting services primarily in the areas of Board Development, Executive Evaluation, Strategic Planning, and Organizational Structure and Development.

2006 – 2011 **President Yukon College, Whitehorse, Yukon** (Retired August 31, 2011)
Yukon College is a comprehensive community college serving the education and training needs for the adult population in Yukon. Yukon College has its administrative headquarters in Whitehorse and has a network of 12 campuses throughout the territory. All campuses are interconnected through video conferencing. The College is a member of the British Columbia Council on Admissions and Transfers and follows the Alberta curriculum for apprenticeship training. The College has partnership degree programs with a variety of Canadian Universities as well as the University of Alaska.

Recent highlights include:

1. A revision and consolidation of Board Governance Policies was completed. A new policy format was devised; and the policies were reduced from 40 to 12.
2. A strategic planning process was developed to maximize internal and external input for Board consideration. The process was implemented and a new five-year strategic plan was adopted in September 2008.
3. The College was reorganized to reflect the new strategic directions.
4. A petition was submitted to government resulting in revisions to the Yukon College Act that, amongst other changes, enshrined an academic council in the legislation; provided the College with degree granting powers; and recognized the role of the Chancellor.
5. The Yukon Cold Climate Innovation Centre (YCCIC), a private sector-government initiative, became a part of the Yukon College Research Centre.
6. Research capacity was expanded and focused. A renovation project was undertaken to provide office space for new researchers. A $2.5 million grant was received (May 2009) from the Arctic Research Infrastructure Fund for further expansion to include storage and laboratory space. This project was completed and opened in 2011.

7. Campus improvement funds were solicited and received for two community campuses ($2.4 million for Dawson City; $1.4 million for Pelly Crossing). These facilities were completed and opened in 2011.
8. New programs were introduced: Licensed Practical Nurse (2008); the Executive Development Leadership Program in First Nations Governance (2008); Masters Degree in Educational Leadership (2009); and a partnership developed with the University of Alberta for a four-year BSc degree majoring in environmental and First Nations studies, delivered on site in Whitehorse.
9. President's Advisory Committee on First Nations Initiatives was established (2007). This is the only committee in Yukon that has representation from all 14 First Nations. Great progress has been made with the First Nations in developing relationships and enhancing services and programs.
10. Developed and initiated the Northern Institute of Social Justice. The Institute provides training and education for jobs with social justice related components in public institutions, various levels of government, (Yukon, Canada, First Nations), and non-governmental organizations. Also, the NISJ conducts research and provides education to the general public on related themes.
11. Developed a partnership with the Yukon Foundation whereby matching funds were invested in various endowments with the Foundation for the benefit of Yukon College students. This fund has been very successful and has attracted about $150,000 in three years.

2004 – 2006 **Consultant, T. Weninger and Associates Inc., Prince George, B.C.**
Provision of consulting services for a number of community initiatives including:
- Community relations and communications in support of the BC Treaty Negotiations process;
- Strategic planning, capital campaign development and implementation, and Board and Staff development for the Spirit of the North Healthcare Foundation;
- Board development workshops for various community organizations;
- Executive Director of the Spirit of the North Healthcare Foundation, a not-for-profit society to raise funds for the Prince George Regional Hospital.

1990 – 2004 **President, College of New Caledonia, Prince George, B.C. (Retired August 31, 2004)**
Responsible for all facets of leading and managing a comprehensive community college. The College of New Caledonia (CNC) offers college preparation, skills development, career, vocational, technical, trades, and university transfer programmes. Comprised of five regional campuses, CNC has a total student enrolment of 5,800 students in base programs and an additional 15,000 registrations in community and continuing education.

1987 – 1990 Vice-President Administration, Medicine Hat College, Medicine Hat, Alberta
Responsible for all business and financial affairs, physical plant, and student services.

1988 – 1990 Vice-President Academic (Acting), Medicine Hat College, Medicine Hat, Alberta
Concurrent with fulfilling the role of Vice-President Administration, directed all academic areas, the Conservatory of Music and Dance, and community education programmes.

1988 Visiting Lecturer, Department of Education Administration, University of Saskatchewan, Saskatoon, Saskatchewan
Taught Ed Admin 811, a three-semester hour graduate level course covering structure of organizations, management, decision-making and behaviour in organizations.

1985 – 1987   Special Assistant, National Commission on Excellence in Educational Administration, University Council for Educational Administration, Arizona State University, Tempe, Arizona
Examined education administration preparation programmes in major universities in the USA and prepared the recommendations contained in the Commission's report entitled "Leaders for America's Schools".

1985 – 1987   Review Editor, University Council for Educational Administration (UCEA), Arizona State University, Tempe Arizona
Served as editor of the UCEA Review for a consortium of universities in the United States, Canada, Australia and other countries interested in the development of the study and practice of education administration.

1986   Internship Supervisor, Department of Educational Administration and Supervision, Arizona State University, Tempe, Arizona
Supervised and placed interns seeking principal or superintendent certification

1982 – 1984   Deputy Minister, Department of Tourism, Recreation, and Cultural Resources, Government of Yukon, Whitehorse, Yukon Territory
Directed a new tourism department whose mandate was to create a strong tourism industry.

1978 – 1982   Deputy Minister, Department of Education, Government of Yukon, Whitehorse, Yukon Territory
Responsible for primary and secondary education, post-secondary education and human resource planning. In addition to providing advice to the Minister of Education and the Government Cabinet, the department had responsibility for the supervision of the Yukon Schools (K-12), the Yukon Technical and Vocational School, and other post-secondary education initiatives. A major accomplishment in this position was the development of the concept that became Yukon College.

1978 – 1979   Superintendent of Education, Department of Education, Government of Yukon, Whitehorse, Yukon Territory
The Superintendent of Education position was similar to the Deputy Minister position

1977 – 1978   Superintendent of Education (Acting), Department of Education, Government of Yukon, Whitehorse, Yukon Territory

1975 – 1977   Assistant Superintendent of Education, Department of Education, Government of Yukon, Whitehorse, Yukon Territory

1974 – 1975   Teaching Assistant, Department of Education Administration, University of Alberta, Edmonton, Alberta

1964 – 1973   Teacher, Vice Principal, Principal, Supervising Principal, and Assistant to the Chief Superintendent Saskatoon, Saskatchewan

MEMBERSHIP IN PROFESSIONAL AND COMMUNITY ORGANIZATIONS

2008 – Present	Member National Statistics Council of Canada
2007 – 2011	Board Member Yukon Cold Climate Innovation Centre
2007 – 2011	Board Member Development Committee Northern Institute of Justice
2006 – Present	Member Whitehorse Rotary Club
2004 – 2006	Chair, Initiatives Prince George (the organization responsible for Economic Development for the City of Prince George)
2004 – 2004	Treasurer, Initiatives Prince George
2003 – 2005	President, Northern Institute for Resource Studies
2002 – 2004	President, Prince George Hospice House
1997 – 2006	Director, Prince George Cougars Enhancement and Development Fund Society
1996 – 2002	Chair, B.C. Provincial Standing Committee on Evaluation and Accountability
1995 – 1997	Secretary, Prince George Quality Council
1994 – 1996	Chair, BC Institutional Evaluation Steering Committee
1992 – 1993	Chair, Council of Presidents, Advanced Education Council of BC
1991 – 2002	President and founding member, Northern BC Council on Substance Abuse
1991 – 1997	Executive Member, Advanced Education Council of BC
1990 – 2006	Member, Prince George Chamber of Commerce
1990 – 2006	Member Rotary Club of Prince George
1990 – 2002	Director, Northern Institute for Resource Studies

A SAMPLE OF PRESENTATIONS AND SPEECHES

"Why Students Need to Vote", presentation to Yukon College students, Whitehorse, Yukon, September 2008

"Organizational Change and Revitalization", presentation to SASKWATER, Moose Jaw, Saskatchewan, September, 2008

"Facing Climate Change", presentation to students enrolled in "Canada in Modern Age", Meiji University, Tokyo, Japan, April 2008

"Yukon is Open for Business", presentation to Yukon Expo "Meet the North" symposium, Edmonton, Alberta, March 2008

"Intergovernmental Relations", presentation to Association of Yukon Communities Annual General Meeting, Haines Junction, Yukon, April 2008

"Yukon College; The Past, The Present, The Future", presentation to Rotary Club, Whitehorse, Yukon, October, 2006

"Financing Small/Rural Colleges", presentation to the Association of Canadian Community Colleges

"Symposium, Courtenay, BC, February 2001

"Developing Partnerships", presentation to the City of Quesnel Chamber of Commerce Business Excellence Awards Ceremony, February 2001

Performance Reporting: How Key Performance Indicators Contribute to Institutional Effectiveness", presentation to the Advanced Education Council of British Columbia Annual General Meeting, Nelson, BC, June 2000

"Board Evaluation: A Cornerstone of Board Governance", presentation to the Association of Canadian Community Colleges Annual General Meeting, Whitehorse, Yukon, May 2000

"An Accountability Framework for the Public Post-Secondary System", presentation to the Advanced Education Council of British Columbia Annual General Meeting, Kelowna, BC, June 1996

"Advancing Advanced Education: Evolution and Revolution on the Northern Frontier", presentation to the Advanced Education Council of British Columbia Annual General Meeting, Prince George, BC, June 1991

"The Programme Advisory Committee: Potential for Change", presentation to the Advanced Education Council of British Columbia Annual General Meeting, Prince George, BC, June 1991

"Junior Colleges in Action", presentation to the Saskatchewan Symposium "Access and Opportunity: A Junior College System for Saskatchewan", Melfort, Saskatchewan, October 1989

"The Future is Ours: Public Education", presentation at the Southeast Alberta Chapter of Phi Delta Kappa, Medicine Hat, Alberta, November 1988

"The Dissatisfaction Theory: A Quarter Century of Research", presentation to the American Education Research Association (AERA), New Orleans, Louisiana, April 1988

"The National Commission on Excellence in Educational Administration:, a presentation to the Arizona Conference, an invitational conference for school superintendents", Scottsdale, Arizona, August 1986

"Parental Involvement in Education – A Yukon Model", Annual Conference of Yukon School Committees, November 1980

"A Proposal for the Education of Yukon Indian People", a presentation to the Federal-Territorial Yukon Indian Land Claims Negotiations, Vancouver, B.C., October 1980

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APPENDIX B

GM@W Online Survey

What is GM@W?

Guarding Minds @ Work (GM@W) is a unique, evidence-based, comprehensive set of resources designed to effectively assess and address psychological health and safety in the workplace.

A psychologically healthy and safe workplace is one that promotes employees' psychological well-being and actively works to prevent harm to employee psychological health due to negligent, reckless or intentional acts.

You are being asked to complete this survey because your workplace is undertaking a review of its psychological health and safety. Employee input is a critical component of this review.

Survey Instructions: This survey contains 68 statements about common work experiences. The statements cover a range of topics including: work responsibilities, work relationships and leadership. Please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each statement.

When responding to these statements, please keep the following in mind:

- Answer based on your own personal experiences in your current job.
- Choose the answer that is true most of the time.
- This survey is concerned with your thoughts, opinions and feelings. If you are unsure of an answer, please select the option that you believe is most likely to be true.
- These statements use the terms 'employee', 'staff', 'supervisor', 'management' and 'employer', however your workplace may use different language to describe these roles. Please respond keeping in mind the terms appropriate for your workplace.

GM@W Survey

Please note: Your answers are anonymous and individual responses will be kept confidential. This questionnaire takes 10 to 15 minutes to complete.

1. My employer offers services or benefits that adequately address my psychological and mental health.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

2. All people in our workplace are held accountable for their actions.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

3. In my job, I know what I am expected to do.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

4. People treat each other with respect and consideration in our workplace.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

5. Hiring/promotion decisions consider the "people skills" necessary for specific positions.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

6. I receive feedback at work that helps me grow and develop.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

7. My immediate supervisor appreciates my work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

8. I am able to talk to my immediate supervisor about how I do my work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

9. The amount of work I am expected to do is reasonable for my position.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

10. I enjoy my work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

11. My employer encourages me to take my entitled breaks (e.g., lunchtime, sick time, vacation time, earned days off, parental leave).

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

12. My employer is committed to minimizing unnecessary stress at work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

13. Management takes appropriate action to protect my physical safety at work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

14. My supervisor would say or do something helpful if I looked distressed while at work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

15. People at work show sincere respect for others' ideas, values and beliefs.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

16. Leadership in my workplace is effective.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

17. Our workplace effectively handles "people problems" that exist between staff.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

18. My company hires people who fit well within the organization.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

19. My supervisor is open to my ideas for taking on new opportunities and challenges.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

20. I am paid fairly for the work I do.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

21. I have some control over how I organize my work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

22. I can talk to my supervisor about the amount of work I have to do.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

23. I am willing to give extra effort at work if needed.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

24. I am able to reasonably balance the demands of work and personal life.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

25. My immediate supervisor cares about my emotional well-being.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

26. My employer offers sufficient training to help protect my physical safety at work (emergency preparedness, safe lifting, violence prevention).

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

27. I feel supported in my workplace when I am dealing with personal or family issues.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

28. Difficult situations at work are addressed effectively.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

29. I am informed about important changes at work in a timely manner.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

30. People from all backgrounds are treated fairly in our workplace.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

31. I have the social and emotional skills needed to do my job well.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

32. I have the opportunity to advance within my organization.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

33. My company appreciates extra effort made by employees.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

34. My opinions and suggestions are considered at work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

35. I have the equipment and resources needed to do my job well.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

36. My work is an important part of who I am.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

37. My employer promotes work-life balance.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

38. My employer makes efforts to prevent harm to employees from harassment, discrimination or violence.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

39. When physical accidents occur or physical risks are identified, my employer responds effectively.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

40. My workplace supports employees who are returning to work after time off due to a mental health condition.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

41. I feel that I am part of a community at work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

42. My supervisor provides helpful feedback on my performance.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

43. Unnecessary conflict is kept to a minimum in our workplace.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

44. My supervisor believes that social skills are as valuable as other skills.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

45. My company values employees' ongoing growth and development.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

46. Our organization celebrates our shared accomplishments.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

47. I am informed of important changes that may impact how my work is done.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

48. My work is free from unnecessary interruptions and disruptions.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

49. I am committed to the success of my organization.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

50. I can talk to my supervisor when I am having trouble maintaining work-life balance.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

51. I would describe my workplace as being psychologically healthy.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

52. I have the equipment and tools I need to do my job in a physically safe way (protective clothing, adequate lighting, ergonomic seating).

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

53. People in my workplace have a good understanding of the importance of employee mental health.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

54. Employees and management trust one another.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

55. My organization provides clear, effective communication.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

56. My workplace has effective ways of addressing inappropriate behaviour by customers or clients.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

57. My position makes good use of my personal strengths.

_____Strongly Agree _____Somewhat agree _____Somewhat disagree _____Strongly Disagree

58. I have the opportunity to develop my "people skills" at work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

59. My employer values my commitment and passion for my work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

60. My employer encourages input from all staff on important issues related to their work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

61. I have control over prioritizing tasks and responsibilities when facing multiple demands at work.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

62. I am proud of the work I do.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

63. I have energy left at the end of most workdays for my personal life.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

64. My employer deals effectively with situations that may threaten or harm employees (e.g., harassment, discrimination, violence).

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

65. My employer responds appropriately when workers raise concerns about physical safety.

____Strongly Agree ____Somewhat agree ____Somewhat disagree ____Strongly Disagree

Specific Areas of Concern

1. In my workplace, I am experiencing discrimination because of my cultural/ethnic background, disability, sexual orientation, gender or age.

_____Yes _____No

2. In my workplace, I am being bullied or harassed, either verbally, physically or sexually.

_____Yes _____No

3. In my workplace, I am being treated unfairly because I have a mental illness.

_____Yes _____No

1. What department/branch do you belong to?

_____Central Office
_____School - Faith-Based
_____School - Traditional Palliser
_____ Other

2. What is your sex?

_____Male
_____Female
_____No response

3. How old are you?

_____12-17
_____18-24
_____25-34
_____35-44
_____45-54
_____55-64
_____65-74
_____75+
_____No response

4. What is the highest level of education that you have attained?

_____Public/Elementary School
_____Some High School
_____Graduated High School
_____Vocational/technical/college/CEGEP
_____Some University
_____Graduated University
_____Some Post-Graduate Education (Masters, PhD)
_____Completed Post-Graduate Degree (Masters, PhD)
_____No response

5. Are you a member of a union?

_____Yes
_____No
_____No response

6. Do you mostly work in a setting where other employees are present or do you mostly work alone?

_____Mostly work in a setting where other employees are present
_____Mostly work alone
_____No response

7. Which of the following best describes your seniority level within your company or organization?

_____Junior Level
_____Mid-Level
_____Senior Level
_____No response

8. In your job, are you directly responsible for managing others?

_____Yes
_____No
_____No response

[If Yes]

9. In your job, about how many employees do you supervise on a day-to-day basis? Please indicate how many employees report to you directly and how many employees report to you indirectly (that is, how many employees report to supervisors who report to you).

Directly

_____0
_____1-5
_____6-10
_____11-20
_____21-50
_____51-100
_____101-299
_____300-499
_____500+
_____No response

Indirectly
_____0
_____1-5
_____6-10
_____11-20
_____21-50

_____51-100
_____101-299
_____300-499
_____500+
_____No response

10. For approximately how long have you been working for your present employer (in any capacity)?

_____Less than 6 months
_____6 months to <1 year
_____1 year to <2 years
_____2 years to <4 years
_____4 years to <6 years
_____6 years to <8 years
_____8 years to <10 years
_____10 years to <15 years
_____15 years to < 20 years
_____20 years to <25 years
_____25 years to <30 years
_____30 years to <35 years
_____35 years to <40 years
_____>40 years

11. For approximately how long have you been in your current position with your present employer?

_____Less than 6 months
_____6 months to <1 year
_____1 year to <2 years
_____2 years to <4 years
_____4 years to <6 years
_____6 years to <8 years
_____8 years to <10 years
_____10 years to <15 years
_____15 years to < 20 years
_____20 years to <25 years
_____25 years to <30 years
_____30 years to <35 years
_____35 years to <40 years
_____>40 years

12. Which of the following, if any, describe your current type of employment?

_____Permanent
_____Contract

_____Seasonal
_____Casual/Temporary
_____No response

13. Which of the following best describes your current employment status?

_____Employed full-time (30 or more hours per week) - including if on leave, such as parental, educational or disability
_____Employed part-time (less than 30 hours per week) - including if on leave, such as parental, educational or disability
_____Self-employed
_____No response

APPENDIX C

Employee Interview Guide

Introduction:

1. Review the terms of reference for the panel.

    a. organizational climate, culture and leadership,
    b. governance practices,
    c. accountability to stakeholders and
    d. internal/external communication practices

2. Review confidentiality of responses.

3. We are going to ask you a series of questions, most are open ended. Some are very general to help us understand the policies and procedures at Palliser, others are based on the evidence we have gathered to date. You may not like some of the questions that we ask, but it is important that organizational leaders have the opportunity to respond and explain. We ask that you respond truthfully and to the best of your ability. You can refuse to answer any of the questions we ask, and it is important to tell us if you don't know the answer.

Questions:

1. To begin, perhaps you can tell us a bit about your background, qualifications and role at Palliser.

2. Considering the main focus of this review, what do you think that Palliser is doing well?

3. What do you think are Palliser's primary challenges or areas of concern?

4. How is hiring normally done at Palliser?
    a. Who is involved in the hiring process?
    b. Who makes the final decisions?
    c. It has been suggested that Palliser has people in positions that are a conflict of interest because of family or close personal relationships. What is your perspective on this?
        i. Are you aware of policies or practices in place that address any potential conflict of interest?
        ii. Are these effective? Why or why not?

5. Tell us what you know about the performance management processes at Palliser.
    a. If an employee is not meeting performance expectations, how is this usually handled?
        i. Is there a standard procedure in place for coaching and/or progressive discipline?

b. It has been suggested that meetings about school or employee performance have a strong focus on negative data with little attention to areas of strong performance. What is your perspective on this?

c. How are decisions made about employee transfers? Who is usually involved?
   i. It has been suggested that transfers have been used as a threat or method of punishing individuals who speak out or encouraging people to exit the organization. What is your perspective on this issue?

6. Tell us what you know about Palliser's processes for handling serious stakeholder complaints?
   a. If a parent has a complaint what is the process and who would typically be involved in the investigation of those complaints?
   b. If an employee has a complaint, what is the process and who is typically involved in the investigation of those complaints?
   c. Who/how many people within Palliser are trained to conduct investigations of issues that may have serious consequences for the parties?
      i. How is it managed if there is a close personal relationship between the investigator and either the complainant or the employee the complaint is about?

7. How would you describe your personal leadership style?
   a. How would you describe leadership style of other senior leaders in the organization?
   b. How do you think the style of leadership at Palliser impact its operations and employees?

8. There is evidence that the climate at Palliser is not psychologically safe or healthy. In particular it has been suggested that there is a problem with bullying and a lack of civility within the Palliser SD. What is your perspective on this issue?
   a. Have you ever been yelled at, bullied or undermined by a person in a leadership position? By someone else?
   b. Have you observed/overheard when someone else was being yelled at, bullied or undermined by a person in leadership position (or someone else)?
   c. What actions are you aware of that Palliser has taken to address this issue?
      i. Do you think these actions are effective?

9. It has been suggested that decision-making within the SD has become significantly more centralized over the past five years. Would you agree that this is the case?
   a. If this so, do you know the purpose or goal of the centralization?
      i. Is this achieving the objectives it was intended to achieve?
      ii. Are there any unintended consequences?

10. What is your view of Palliser's internal or external communication practices?
    a. What do you feel Palliser does well?

b. Where might they improve?

c. Employees have been directed not to speak directly to the Board, do you know why this decision was made?
    i. Is it achieving the objective it was intended to achieve?
    ii. Are there any unintended consequences?

d. The Board decided against publicly releasing the 2014 organizational review report from Dr. Sloan. Do you know why this decision was made?
    i. Is it achieving the objective it was intended to achieve?
    ii. Are there any unintended consequences?

11. It has been suggested that Palliser regularly monitors employee email. Are you aware of this practice?
    a. Are employees generally aware of this practice?
    b. Have you read or signed any documents that indicate the purpose and extent of employee communications monitoring that occurs in Palliser?

12. What is your perspective regarding current Board operations and governance? What do you think they do well? What needs to be improved?
    a. Do you feel leadership in Palliser is accountable for their actions? If not, what could be done to improve accountability?
    b. Do you think the public is sees the leadership as accountable? If not, how could public awareness of accountability be improved?

13. Is there anything else you would like us to know with respect to the main areas of our review?
    a. organizational climate, culture and leadership,
    b. governance practices,
    c. accountability to stakeholders and
    d. internal/external communication practices

Board of Trustees Interview Guide

Introduction and overview of our process.
Explain confidentiality.
Areas for discussion and questioning will be much the same as in other interviews, but will have a particular emphasis on Board operations.

Questions:

1. Your history as a trustee, what do you do other than being a trustee.

2. What do you feel your role is as a Board member?

3. What does the Palliser Board do well? Where do you feel the Palliser Board could improve its performance?

4. What are the main challenges faced by the Palliser Board?

5. Does the current format of Board meetings (establishing the agenda, distribution of reading materials) allow sufficient time to identify, read, study and discuss Board business effectively?

6. How should the relationship between a School Board and Superintendent be structured? There is a perception, both in and outside of Palliser, that Superintendent Getz is in charge of (controls) the Board What is your perspective on this?

7. In your estimation how much Board time is devoted to each of the following:
   a) hearing administrative reports
   b) discussing future directions for the district
   c) professional development of Board members
   d) evaluating the performance of the Palliser leadership?

8. Do you think the public perceives the Board as accountable? Why? Why not?

9. How does the Board normally deal with stakeholder complaints (parents, staff, councils)?
   a) Who investigates the complaints?
   b) How does the Board follow up or find out about resolution of the complaint?
   c) When asked employees feel that they have no avenue to pursue resolution to complaints against senior management. What is your perspective on this?

10. What is the process for hiring the Superintendent? For evaluating the Superintendent? How do you follow up on areas identified for improvement? Can you see any conflict of interest that might arise from this process?

11. It has been observed that decision making has been significant centralized over the last several years. What were the purposes for this move? Are those purposes being fulfilled? Are there any unintended consequences?

12. There is evidence that the climate in Palliser SD is not psychologically safe or healthy – this includes interactions with the Board. In particular it has been suggested that there is a problem with bullying, a lack of civility and a lack of trust. What is your perspective on this? Have you ever observed or overheard when someone is being yelled at, bullied or undermined? How do you think Palliser should deal with this issue?

13. What is your view of Palliser's internal and external communication? What does Palliser do well? Where might the district improve?
    a) We have been told that communications between trustees and staff is or was not permitted What was the rationale for this decision? Were the objective achieved? Were there any unintended consequences?

14. How is the Board evaluated? Do individual Board members receive evaluations? How does the Board follow up on any evaluations that are conducted to address areas identified as requiring improvement?

15. We have been made aware of complaints about use of alcohol at SD sponsored events. What policies does the Board have relative to alcohol at SD sponsored events? What policies are in place to discourage on or off-duty conduct (e.g. public behaviours) that could result in a negative image for the school district?

16. We have been made aware of complaints about private use of School District vehicles. What policies govern the private use of SD vehicles?

17. We have been received complaints about "nepotism" at the senior leadership level in Palliser. While we have found no evidence that senior leaders are not qualified for the jobs they hold, there remains a public perception that the current relationships create a conflict of interest. What policies and procedures are in place to manage conflicts of interest, and what do you think Palliser can/should do to alter this perception?

18. Is there anything else you would like us to know with respect to the main areas of the review?

APPENDIX D

GM@W Overview Report

ORGANIZATION: Palliser SD
ORGANIZATIONAL REPRESENTATIVE: Kelly Williams-Whitt
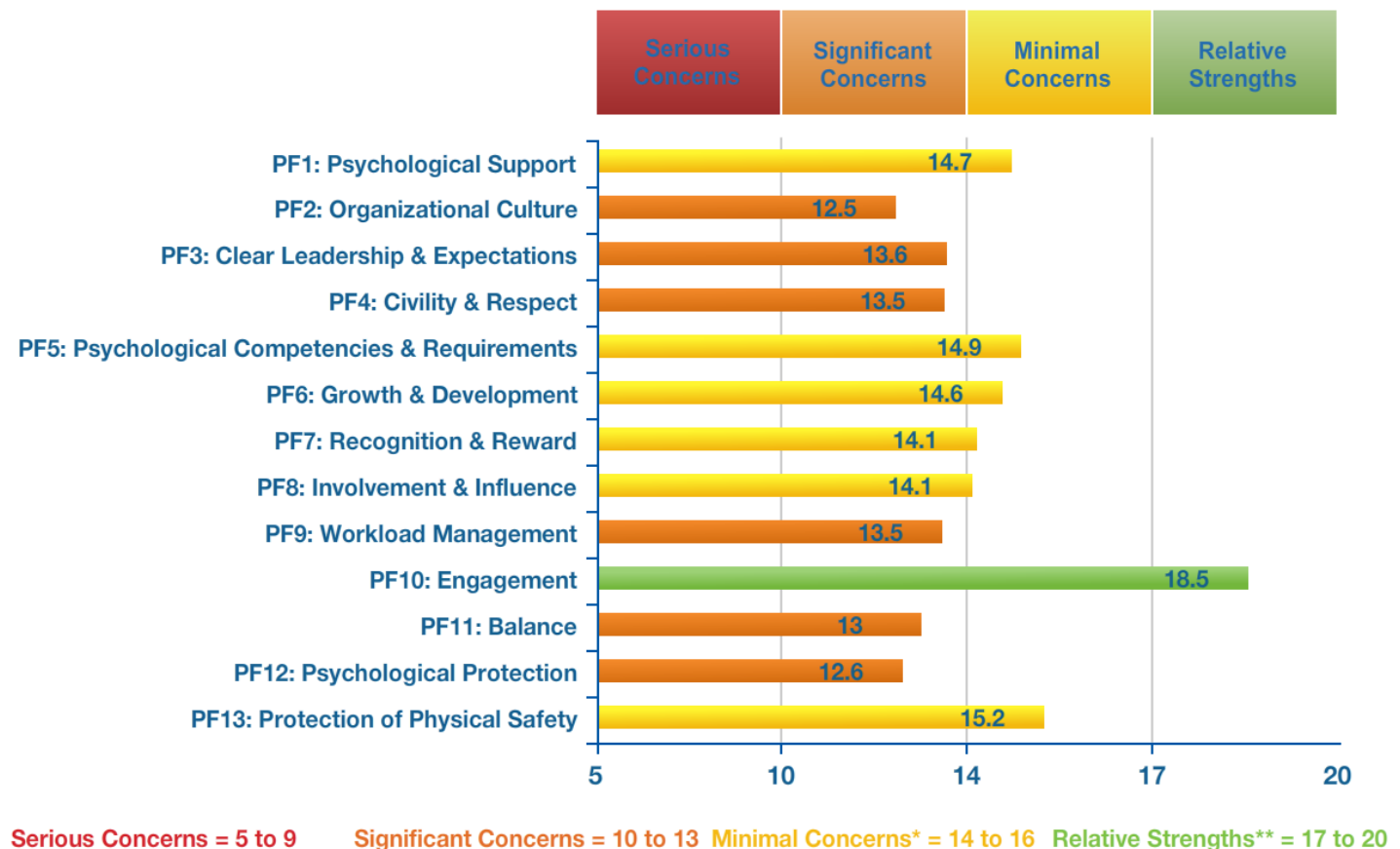**GM@W ONLINE SURVEY NAME:** Palliser Survey 2016
GM@W ONLINE SURVEY CLOSE DATE: 2016-07-13 19:00:19
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ORGANIZATION INFORMATION

Total number of employees, company-wide	500+
Number of employees to whom this GM@W Online Survey was delivered	500+
Number of employees who completed this GM@W Online Survey (total number of employee respondents)	363
Type of Organization	Not-for-profit, Public Sector, Mixed
Industry sector	Educational services

EMPLOYEE DEMOGRAPHIC RESULTS

Department/Branch	Percentage of Total Employee Respondents (n = 363)
Central Office	7.99%
School - Traditional Palliser	52.34%
School - Faith-Based	32.23%
x Other	7.44%

GM@W Overview Report

GuardingMinds @ WORK

MEAN RESPONSE BY PSYCHOSOCIAL FACTOR

The following graph presents your organization's GM@W Survey Results at a glance. Please note any areas of concern or relative strength within your organization. Psychosocial Factors flagged as Significant Concerns should be your top priority.

Serious Concerns	Significant Concerns	Minimal Concerns	Relative Strengths

Psychosocial Factor	Value
PF1: Psychological Support	14.7
PF2: Organizational Culture	12.5
PF3: Clear Leadership & Expectations	13.6
PF4: Civility & Respect	13.5
PF5: Psychological Competencies & Requirements	14.9
PF6: Growth & Development	14.6
PF7: Recognition & Reward	14.1
PF8: Involvement & Influence	14.1
PF9: Workload Management	13.5
PF10: Engagement	18.5
PF11: Balance	13
PF12: Psychological Protection	12.6
PF13: Protection of Physical Safety	15.2

Axis: 5, 10, 14, 17, 20

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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GM@W Overview Report

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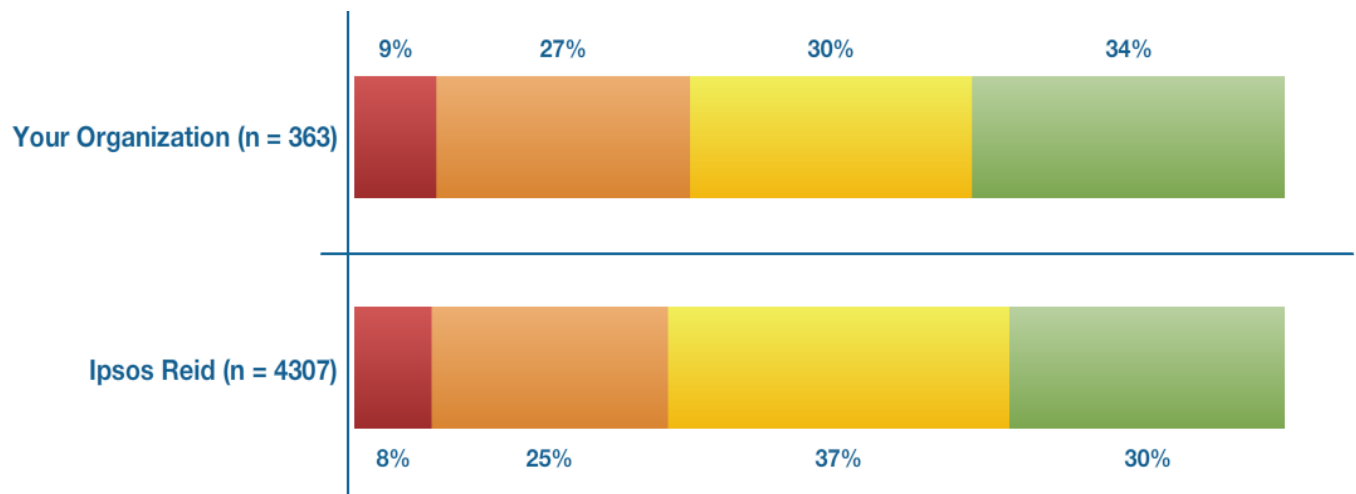**GM@W REPORT GENERATION DATE:** 2016-07-14 07:51:19

SPECIFIC AREAS OF CONCERN

Here are the results for the specific areas of concern questions for your organization.
The corresponding results of the 2012 national Ipsos Reid survey are presented below for comparison.

RESULTS FROM YOUR ORGANIZATION (n = 363 Respondents)

7.7% (n = 28) of employees reported experiencing discrimination in the workplace because of their cultural/ethnic background, disability, sexual orientation, gender or age.

15.2% (n = 55) of employees reported being bullied or harassed, either verbally, physically or sexually in the workplace.

1.7% (n = 6) of employees reported being treated unfairly in the workplace because they have a mental illness.

RESULTS FROM IPSOS REID SURVEY (n = 4307 Respondents)

5.5% (n = 236) of respondents reported experiencing discrimination in the workplace because of their cultural/ethnic background, disability, sexual orientation, gender or age.

6.7% (n = 289) of respondents reported being bullied or harassed, either verbally, physically or sexually in the workplace.

1.3% (n = 54) of reported being treated unfairly in the workplace because they have a mental illness.

In May and June 2012,Ipsos Reid was commissioned by GM@W to conduct a public opinion survey on psychosocial risks in Canadian workplaces using the GM@W Survey.
In total, 4307 working Canadians across a nationally representative sample of industries and geographical regions completed the GM@W Survey.

GM@W Overview Report

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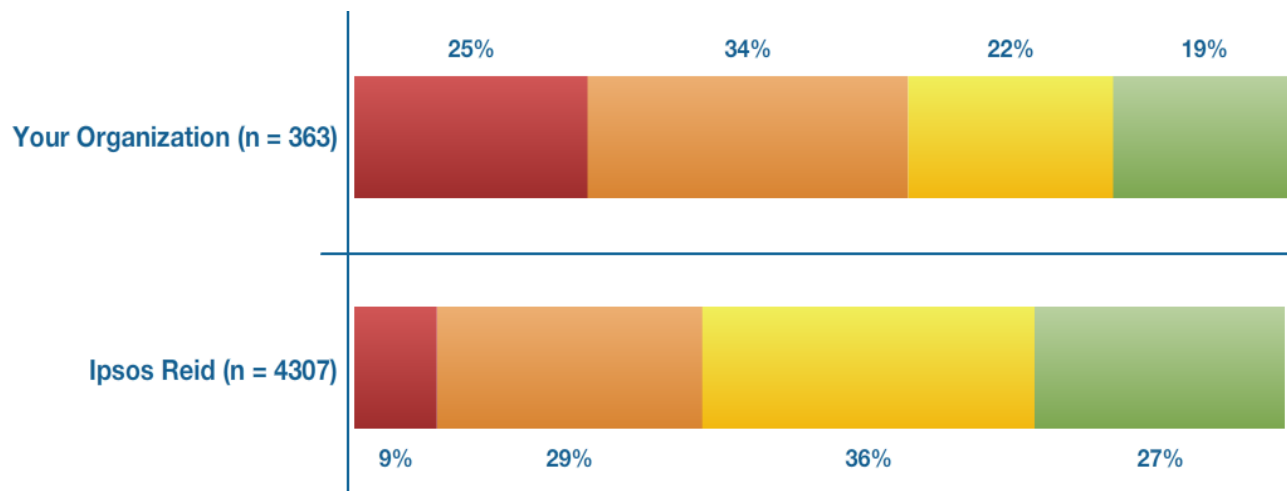**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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GuidingMinds
@ WORK

PF1: PSYCHOLOGICAL SUPPORT

A work environment where coworkers and supervisors are supportive of employees' psychological and mental health concerns, and respond appropriately as needed.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF1: Psychological Support. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363)	9%	27%	30%	34%
Ipsos Reid (n = 4307)	8%	25%	37%	30%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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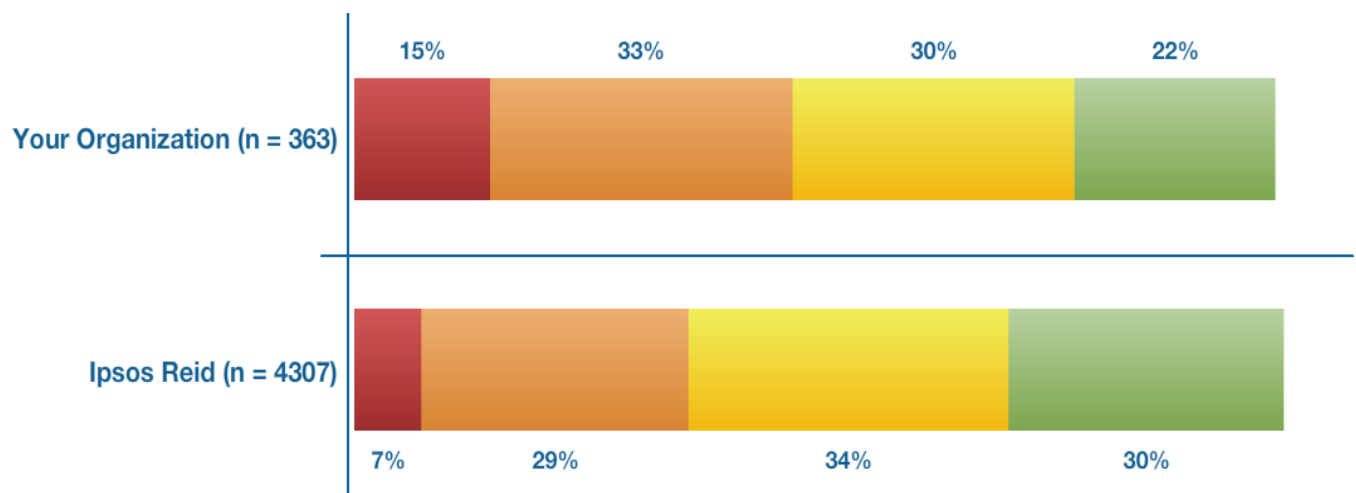**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
GM@W REPORT GENERATION DATE: 2016-07-14 07:51:19

Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. *My employer offers services or benefits that adequately address my psychological and mental health.*

2. *My supervisor would say or do something helpful if I looked distressed while at work.*

3. *I feel supported in my workplace when I am dealing with personal or family issues.*

4. *My workplace supports employees who are returning to work after time off due to a mental health condition.*

5. *People in my workplace have a good understanding of the importance of employee mental health.*

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GuardingMinds
@ WORK

PF2: ORGANIZATIONAL CULTURE

A work environment characterized by trust, honesty and fairness.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF2: Organizational Culture. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363)
25% | 34% | 22% | 19%

Ipsos Reid (n = 4307)
9% | 29% | 36% | 27%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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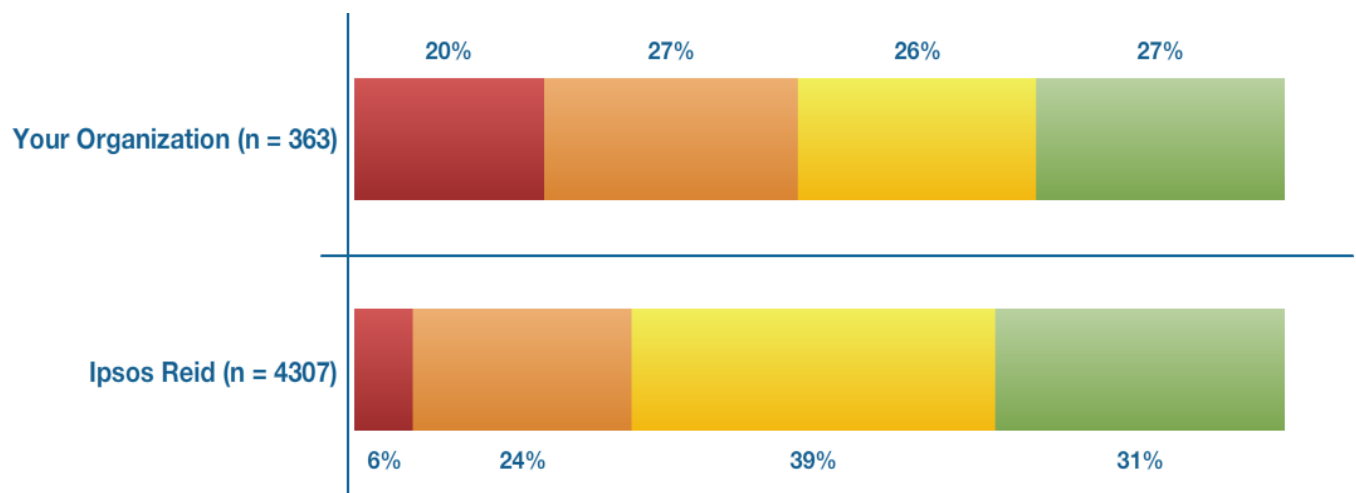**GM@W REPORT GENERATION DATE:** 2016-07-14 07:51:19

Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. All people in our workplace are held accountable for their actions.

2. People at work show sincere respect for others' ideas, values and beliefs.

3. Difficult situations at work are addressed effectively.

4. I feel that I am part of a community at work.

5. Employees and management trust one another.

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GuardingMinds @ WORK

PF3: CLEAR LEADERSHIP & EXPECTATIONS

A work environment where there is effective leadership and support that helps employees know what they need to do, how their work contributes to the organization, and whether there are impending changes.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF3: Clear Leadership & Expectations. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

	Serious Concerns	Significant Concerns	Minimal Concerns	Relative Strengths
Your Organization (n = 363)	15%	33%	30%	22%
Ipsos Reid (n = 4307)	7%	29%	34%	30%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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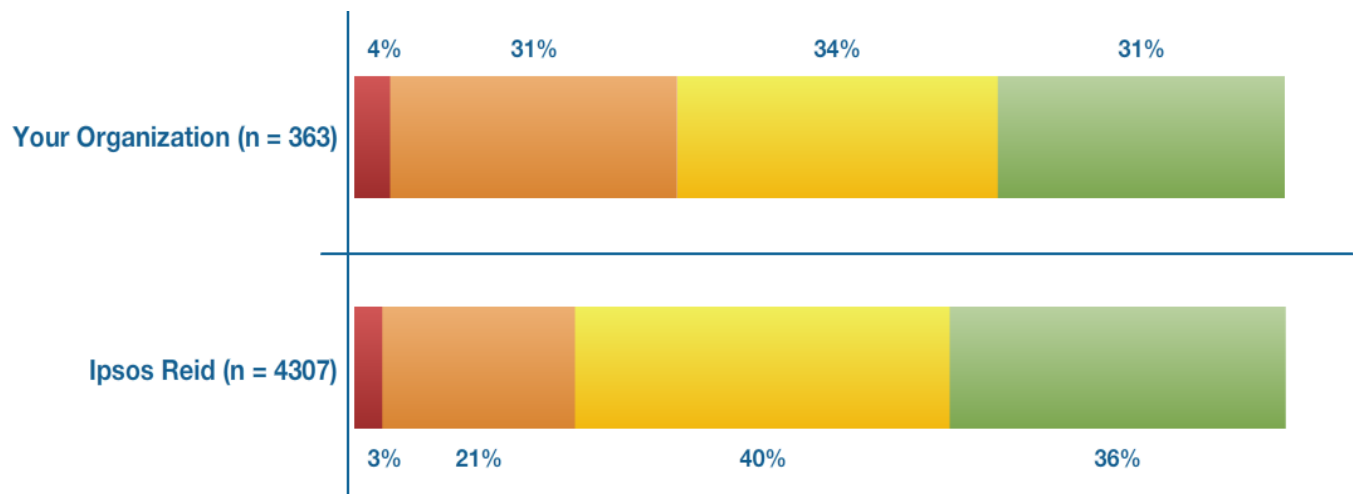**GM@W REPORT GENERATION DATE:** 2016-07-14 07:51:19

Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. In my job, I know what I am expected to do.

2. Leadership in my workplace is effective.

3. I am informed about important changes at work in a timely manner.

4. My supervisor provides helpful feedback on my performance.

5. My organization provides clear, effective communication.

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PF4: CIVILITY & RESPECT

A work environment where employees are respectful and considerate in their interactions with one another, as well as with customers, clients and the public.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF4: Civility & Respect. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363)
20% | 27% | 26% | 27%

Ipsos Reid (n = 4307)
6% | 24% | 39% | 31%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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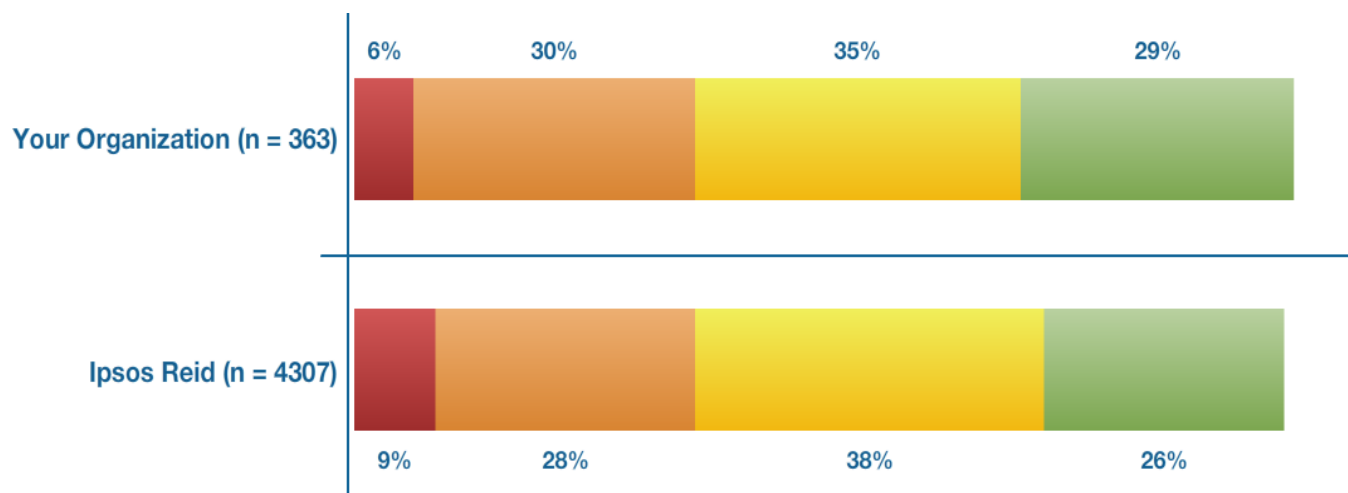**GM@W REPORT GENERATION DATE:** 2016-07-14 07:51:19

Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. People treat each other with respect and consideration in our workplace.

2. Our workplace effectively handles "people problems" that exist between staff.

3. People from all backgrounds are treated fairly in our workplace.

4. Unnecessary conflict is kept to a minimum in our workplace.

5. My workplace has effective ways of addressing inappropriate behaviour by customers or clients.

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GuardingMinds @ WORK

PF5: PSYCHOLOGICAL COMPETENCIES & REQUIREMENTS

A work environment where there is a good fit between employees' interpersonal and emotional competencies and the requirements of the position they hold.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF5: Psychological Competencies & Requirements. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363)

| 4% | 31% | 34% | 31% |

Ipsos Reid (n = 4307)

| 3% | 21% | 40% | 36% |

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. *Hiring/promotion decisions consider the "people skills" necessary for specific positions.*
2. *My company hires people who fit well within the organization.*
3. *I have the social and emotional skills needed to do my job well.*
4. *My supervisor believes that social skills are as valuable as other skills.*
5. *My position makes good use of my personal strengths.*

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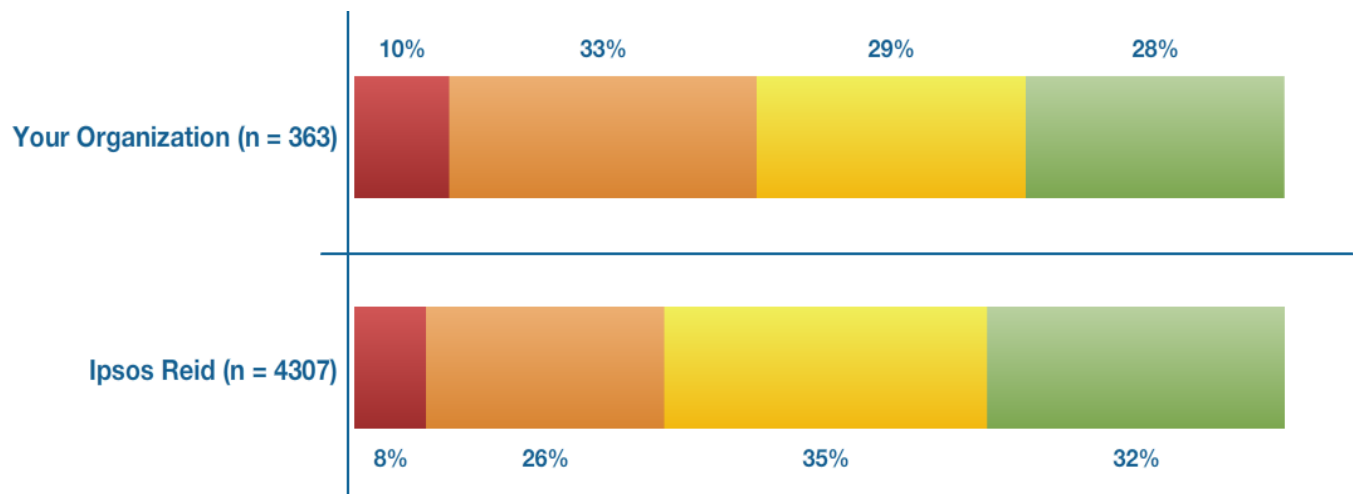**GM@W REPORT GENERATION DATE:** 2016-07-14 07:51:19

PF6: GROWTH & DEVELOPMENT
A work environment where employees receive encouragement and support in the development of their interpersonal, emotional and job skills.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF6: Growth & Development. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

6%	30%	35%	29%

Your Organization (n = 363)

Ipsos Reid (n = 4307)

9%	28%	38%	26%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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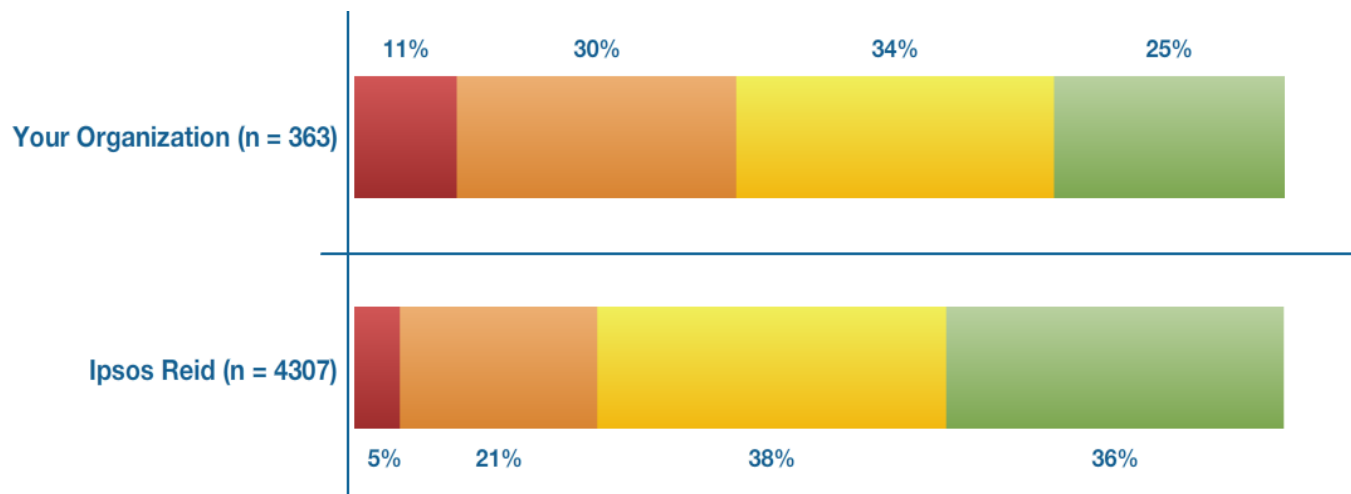**GM@W REPORT GENERATION DATE:** 2016-07-14 07:51:19

Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. I receive feedback at work that helps me grow and develop.

2. My supervisor is open to my ideas for taking on new opportunities and challenges.

3. I have the opportunity to advance within my organization.

4. My company values employees' ongoing growth and development.

5. I have the opportunity to develop my "people skills" at work.

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PF7: RECOGNITION & REWARD

A work environment where there is appropriate acknowledgement and appreciation of employees' efforts in a fair and timely manner.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF7: Recognition & Reward. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

10%	33%	29%	28%

Your Organization (n = 363)

Ipsos Reid (n = 4307)

8%	26%	35%	32%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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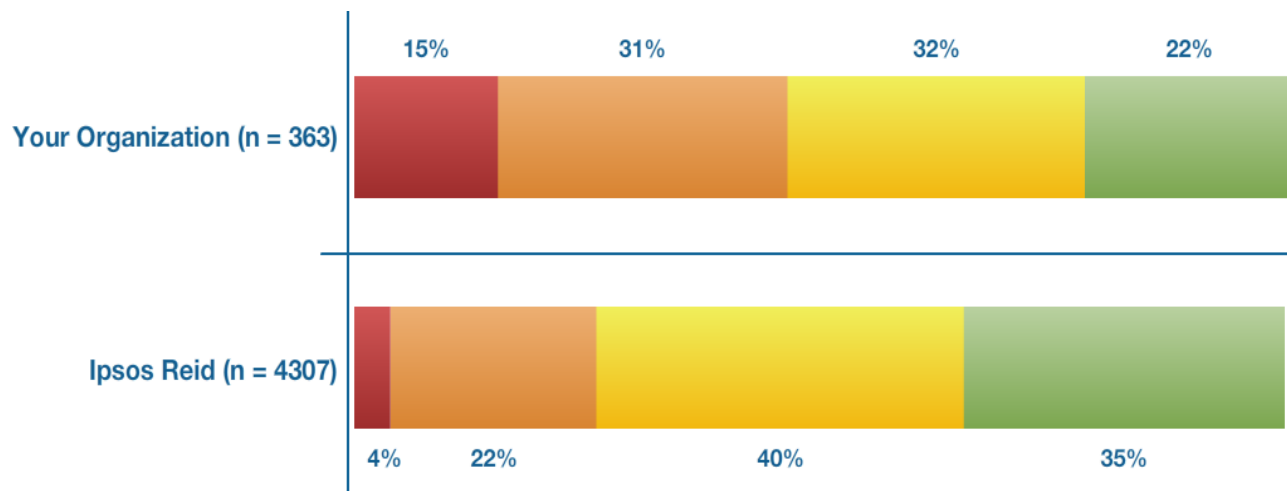**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. My immediate supervisor appreciates my work.

2. I am paid fairly for the work I do.

3. My company appreciates extra effort made by employees.

4. Our organization celebrates our shared accomplishments.

5. My employer values my commitment and passion for my work.

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PF8: INVOLVEMENT & INFLUENCE

A work environment where employees are included in discussions about how their work is done and how important decisions are made.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF8: Involvement & Influence. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363): 11% | 30% | 34% | 25%

Ipsos Reid (n = 4307): 5% | 21% | 38% | 36%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. I am able to talk to my immediate supervisor about how I do my work.

2. I have some control over how I organize my work.

3. My opinions and suggestions are considered at work.

4. I am informed of important changes that may impact how my work is done.

5. My employer encourages input from all staff on important issues related to their work.

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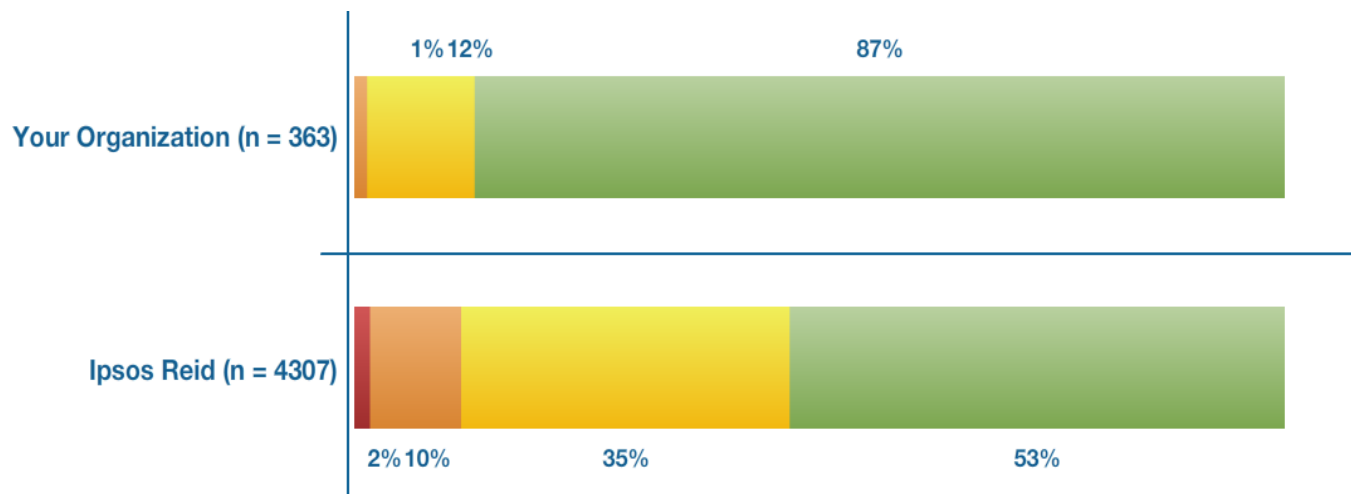**GM@W REPORT GENERATION DATE:** 2016-07-14 07:51:19

PF9: WORKLOAD MANAGEMENT

A work environment where tasks and responsibilities can be accomplished successfully within the time available.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF9: Workload Management. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363)

| 15% | 31% | 32% | 22% |

Ipsos Reid (n = 4307)

| 4% | 22% | 40% | 35% |

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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GM@W Overview Report

ORGANIZATION: Palliser SD
ORGANIZATIONAL REPRESENTATIVE: Kelly Williams-Whitt
GM@W ONLINE SURVEY NAME: Palliser Survey 2016
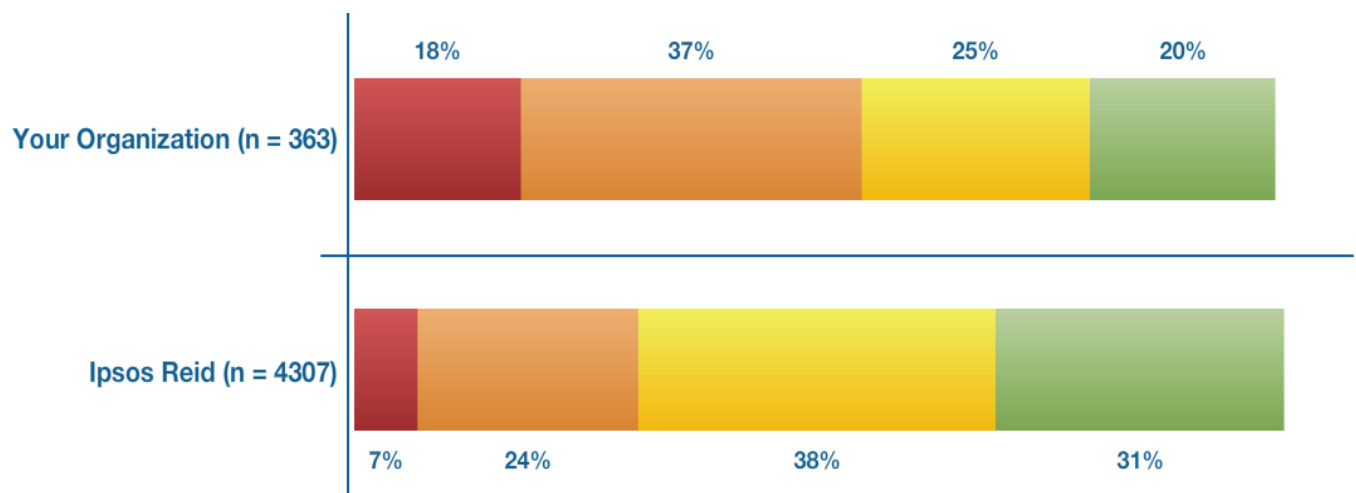**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. The amount of work I am expected to do is reasonable for my position.

2. I can talk to my supervisor about the amount of work I have to do.

3. I have the equipment and resources needed to do my job well.

4. My work is free from unnecessary interruptions and disruptions.

5. I have control over prioritizing tasks and responsibilities when facing multiple demands at work.

GM@W Overview Report

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PF10: ENGAGEMENT

A work environment where employees feel connected to their work and are motivated to do their job well.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF10: Engagement. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363)
1% 12% 87%

Ipsos Reid (n = 4307)
2% 10% 35% 53%

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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GM@W Overview Report

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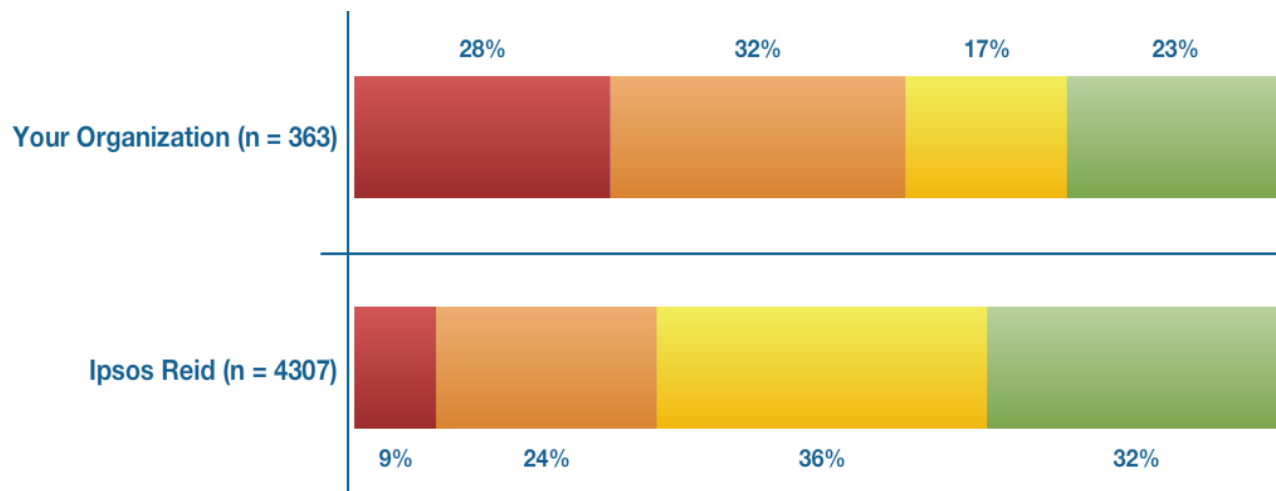**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. I enjoy my work.

2. I am willing to give extra effort at work if needed.

3. My work is an important part of who I am.

4. I am committed to the success of my organization.

5. I am proud of the work I do.

PF11: BALANCE

A work environment where there is recognition of the need for balance between the demands of work, family and personal life.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF11: Balance. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363)

| 18% | 37% | 25% | 20% |

Ipsos Reid (n = 4307)

| 7% | 24% | 38% | 31% |

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. *My employer encourages me to take my entitled breaks*
   (e.g., lunchtime, sick time, vacation time, earned days off, parental leave).
2. *I am able to reasonably balance the demands of work and personal life.*
3. *My employer promotes work-life balance.*
4. *I can talk to my supervisor when I am having trouble maintaining work-life balance.*
5. *I have energy left at the end of most workdays for my personal life.*

GM@W Overview Report

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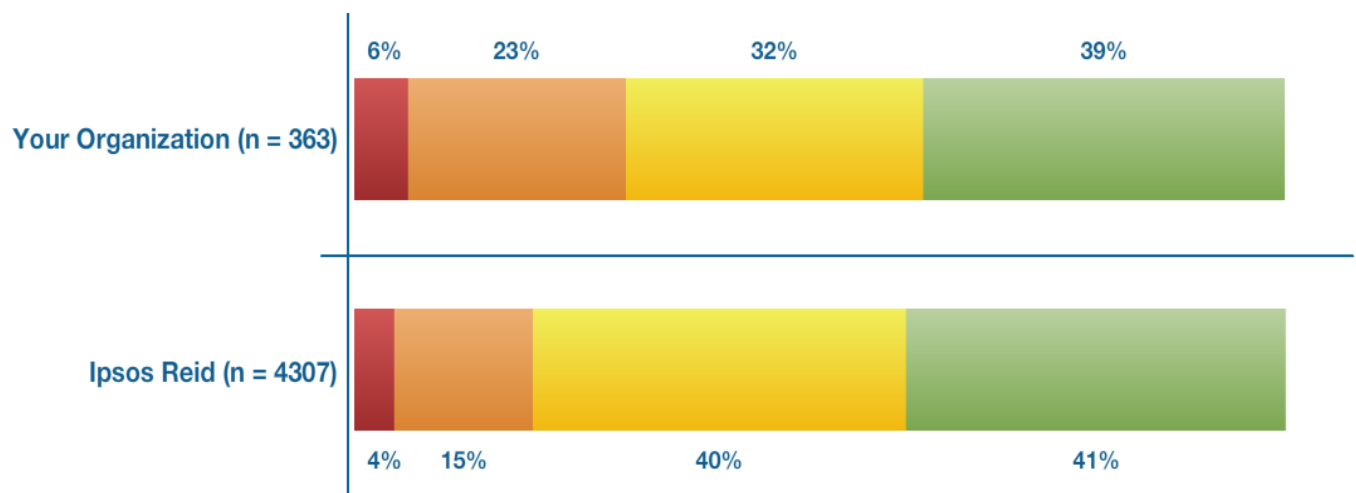**GM@W REPORT GENERATION DATE:** 2016-07-14 07:51:19

PF12: PSYCHOLOGICAL PROTECTION

A work environment where employees' psychological safety is ensured.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF12: Psychological Protection. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363)	28%	32%	17%	23%

Ipsos Reid (n = 4307)	9%	24%	36%	32%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. My employer is committed to minimizing unnecessary stress at work.

2. My immediate supervisor cares about my emotional well-being.

3. My employer makes efforts to prevent harm to employees from harassment, discrimination or violence.

4. I would describe my workplace as being psychologically healthy.

5. My employer deals effectively with situations that may threaten or harm employees
   (e.g., harassment, discrimination, violence).

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PF13: PROTECTION OF PHYSICAL SAFETY

A work environment where management takes appropriate action to protect the physical safety of employees.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF13: Protection of Physical Safety. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 363)
6% | 23% | 32% | 39%

Ipsos Reid (n = 4307)
4% | 15% | 40% | 41%

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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GM@W Overview Report

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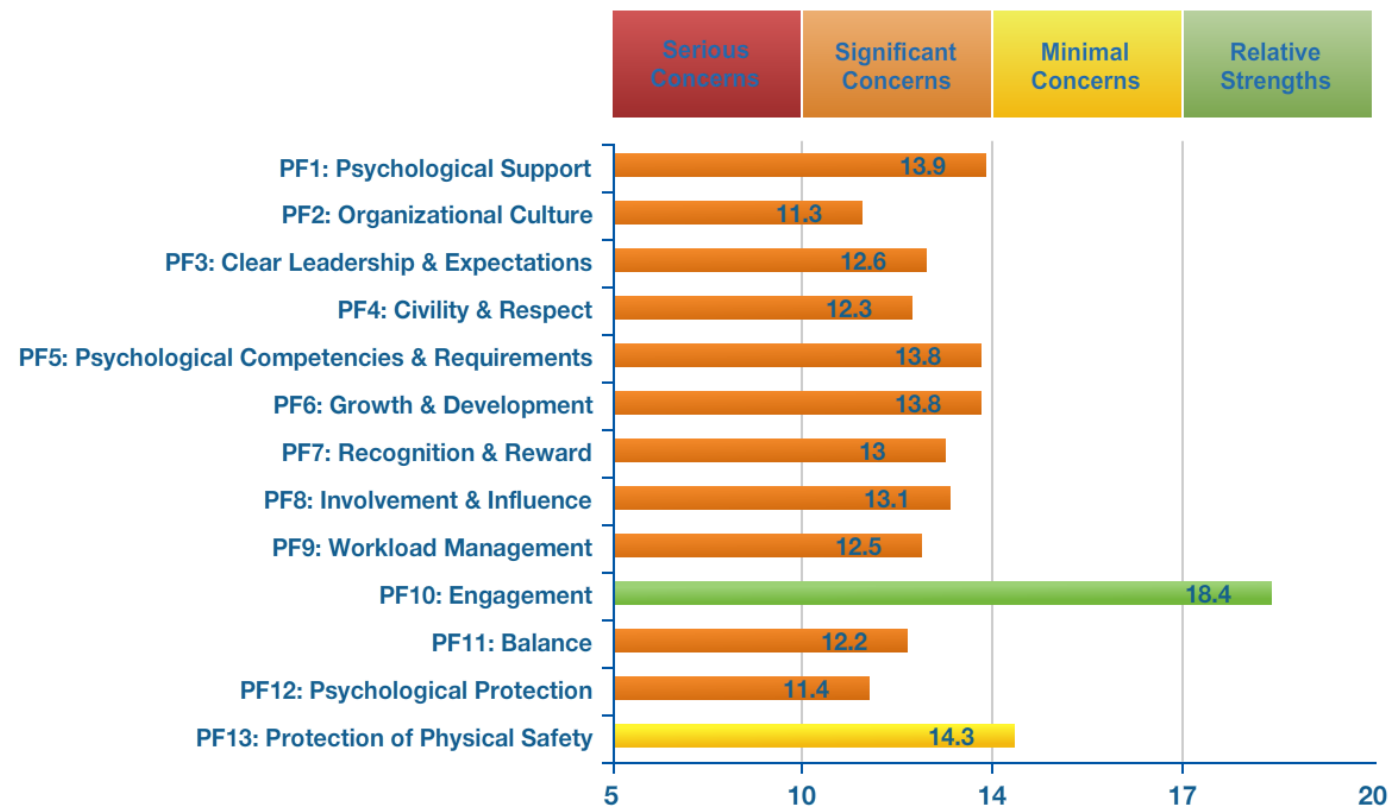**GM@W ONLINE SURVEY NAME:** Palliser Survey 2016
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Employees were asked to rate their level of agreement (on a 4-point scale) with the following statements

1. *Management takes appropriate action to protect my physical safety at work.*
2. *My employer offers sufficient training to help protect my physical safety at work (emergency preparedness, safe lifting, violence prevention).*
3. *When physical accidents occur or physical risks are identified, my employer responds effectively.*
4. *I have the equipment and tools I need to do my job in a physically safe way (protective clothing, adequate lighting, ergonomic seating).*
5. *My employer responds appropriately when workers raise concerns about physical safety*

GM@W Overview Report

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ORGANIZATION INFORMATION

Total number of employees, company-wide	500+
Number of employees to whom this GM@W Online Survey was delivered	500+
Number of employees who completed this GM@W Online Survey (total number of employee respondents)	190
Type of Organization	Not-for-profit, Public Sector, Mixed
Industry sector	Educational services

EMPLOYEE DEMOGRAPHIC RESULTS

Department/Branch	Percentage of Total Employee Respondents (n = 190)
School - Traditional Palliser	100%

GM@W Overview Report

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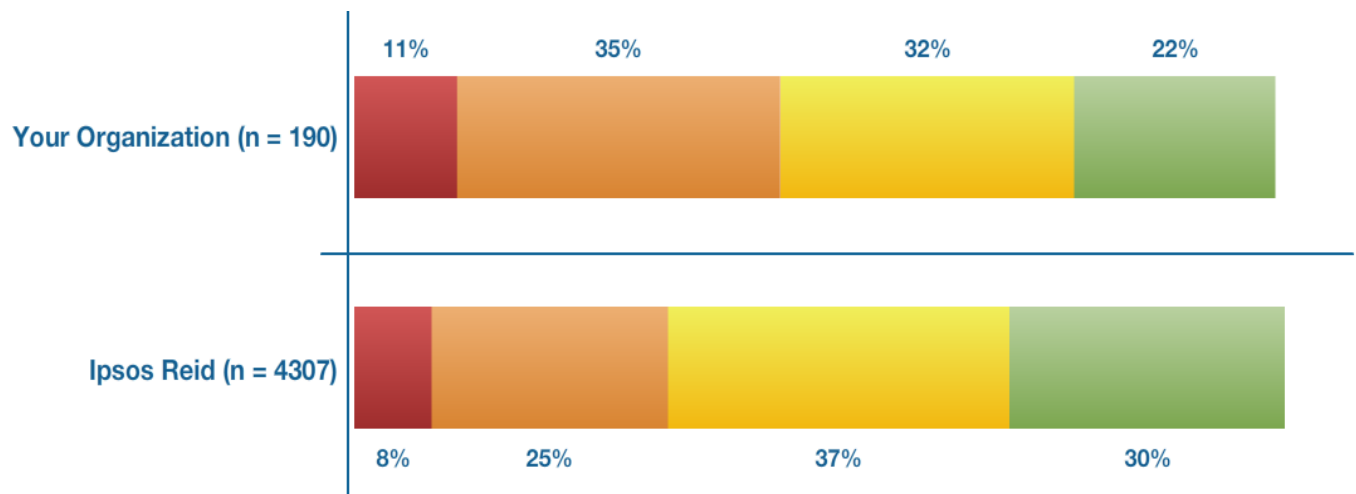**GM@W REPORT GENERATION DATE:** 2016-07-14 07:32:52

MEAN RESPONSE BY PSYCHOSOCIAL FACTOR

The following graph presents your organization's GM@W Survey Results at a glance. Please note any areas of concern or relative strength within your organization. Psychosocial Factors flagged as Significant Concerns should be your top priority.

Serious Concerns	Significant Concerns	Minimal Concerns	Relative Strengths

Psychosocial Factor	Mean
PF1: Psychological Support	13.9
PF2: Organizational Culture	11.3
PF3: Clear Leadership & Expectations	12.6
PF4: Civility & Respect	12.3
PF5: Psychological Competencies & Requirements	13.8
PF6: Growth & Development	13.8
PF7: Recognition & Reward	13
PF8: Involvement & Influence	13.1
PF9: Workload Management	12.5
PF10: Engagement	18.4
PF11: Balance	12.2
PF12: Psychological Protection	11.4
PF13: Protection of Physical Safety	14.3

Scale: 5, 10, 14, 17, 20

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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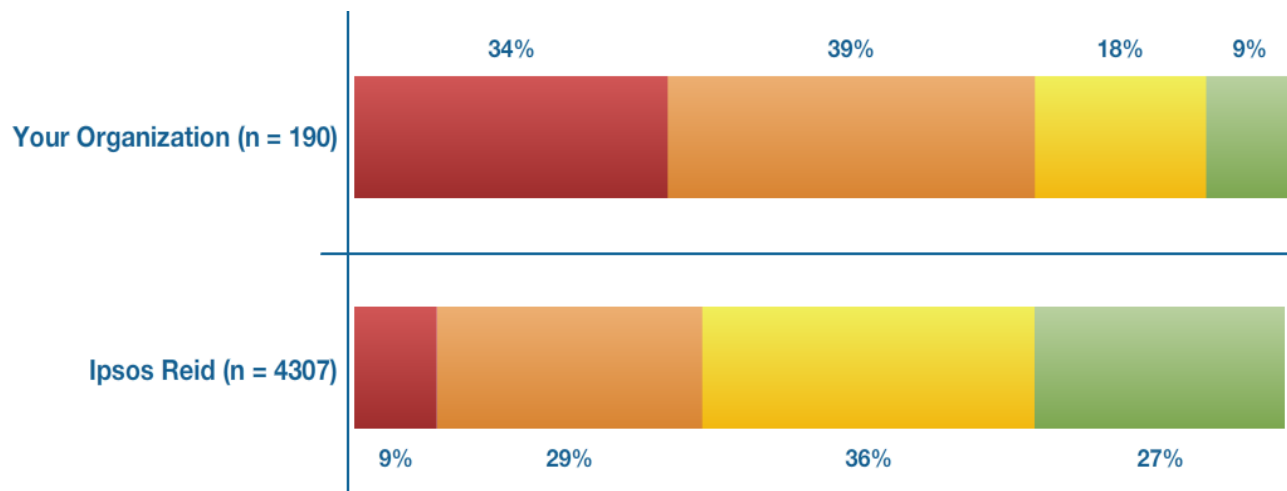**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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SPECIFIC AREAS OF CONCERN

Here are the results for the specific areas of concern questions for your organization.
The corresponding results of the 2012 national Ipsos Reid survey are presented below for comparison.

RESULTS FROM YOUR ORGANIZATION (n = 190 Respondents)

10.5% (n = 20) of employees reported experiencing discrimination in the workplace because of their cultural/ethnic background, disability, sexual orientation, gender or age.

15.8% (n = 30) of employees reported being bullied or harassed, either verbally, physically or sexually in the workplace.

2.1% (n = 4) of employees reported being treated unfairly in the workplace because they have a mental illness.

RESULTS FROM IPSOS REID SURVEY (n = 4307 Respondents)

5.5% (n = 236) of respondents reported experiencing discrimination in the workplace because of their cultural/ethnic background, disability, sexual orientation, gender or age.

6.7% (n = 289) of respondents reported being bullied or harassed, either verbally, physically or sexually in the workplace.

1.3% (n = 54) of reported being treated unfairly in the workplace because they have a mental illness.

In May and June 2012,Ipsos Reid was commissioned by GM@W to conduct a public opinion survey on psychosocial risks in Canadian workplaces using the GM@W Survey.
In total, 4307 working Canadians across a nationally representative sample of industries and geographical regions completed the GM@W Survey.

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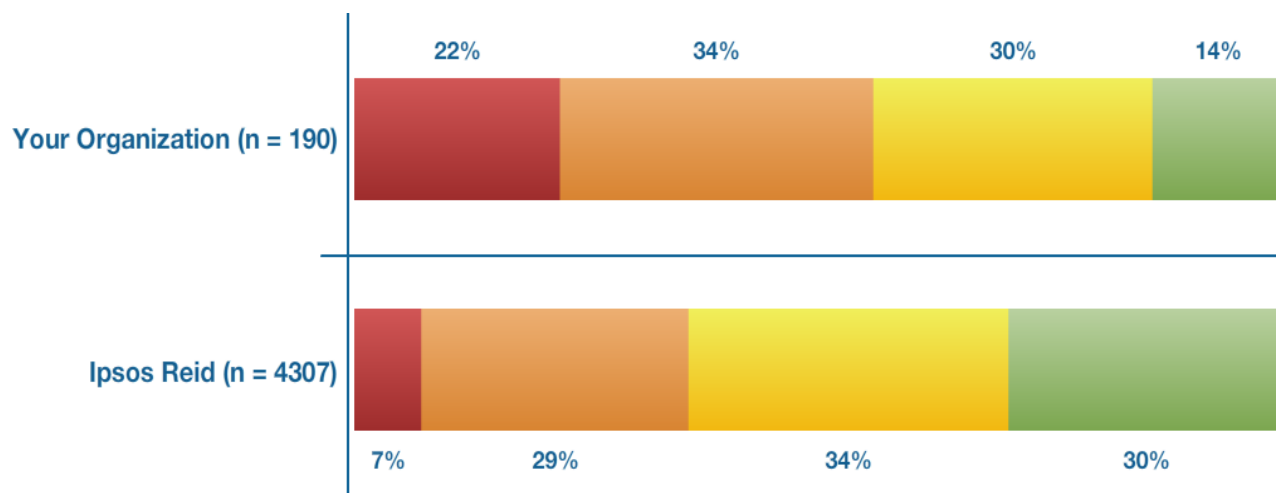**GM@W REPORT GENERATION DATE:** 2016-07-14 07:32:52

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PF1: PSYCHOLOGICAL SUPPORT

A work environment where coworkers and supervisors are supportive of employees' psychological and mental health concerns, and respond appropriately as needed.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF1: Psychological Support. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190)
11% 35% 32% 22%

Ipsos Reid (n = 4307)
8% 25% 37% 30%

Serious Concerns = 5 to 9 **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16** **Relative Strengths** = 17 to 20**

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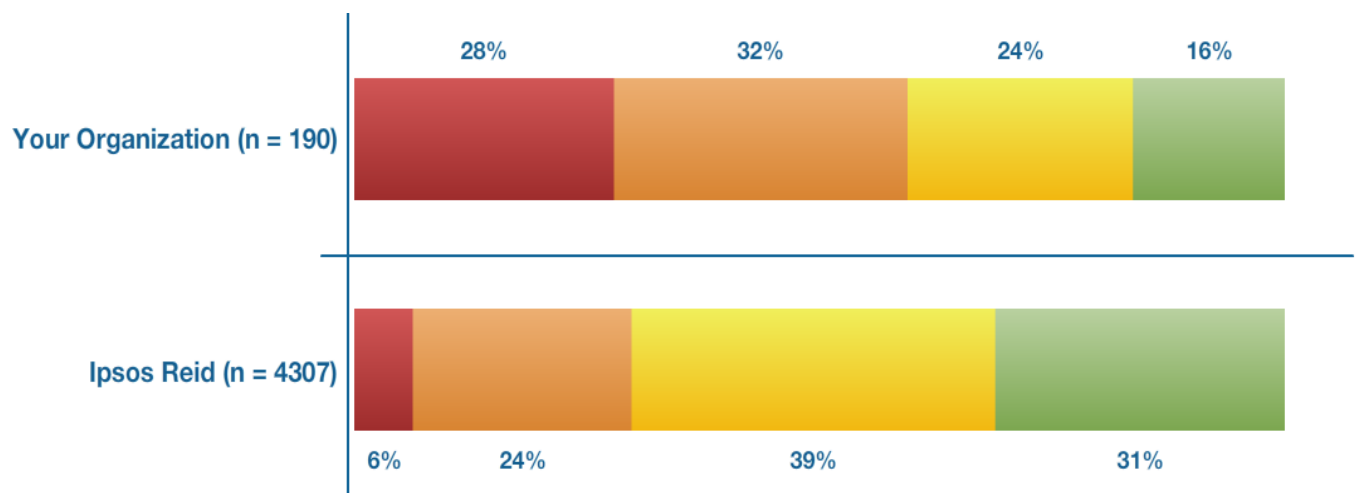**GM@W REPORT GENERATION DATE:** 2016-07-14 07:32:52

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PF2: ORGANIZATIONAL CULTURE

A work environment characterized by trust, honesty and fairness.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF2: Organizational Culture. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190): 34%   39%   18%   9%

Ipsos Reid (n = 4307): 9%   29%   36%   27%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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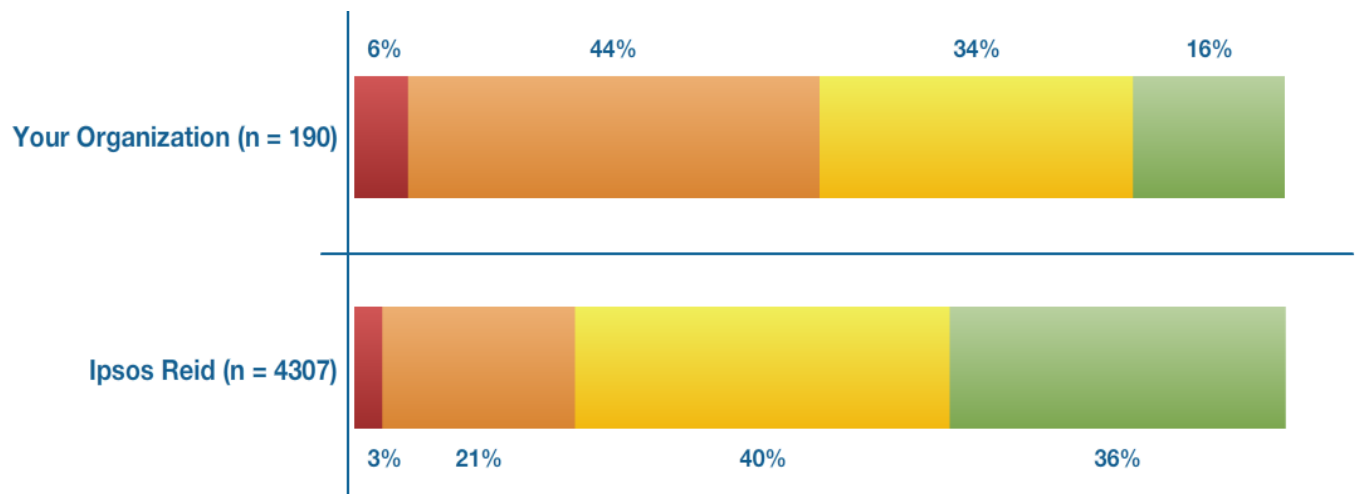**GM@W REPORT GENERATION DATE:** 2016-07-14 07:32:52

PF3: CLEAR LEADERSHIP & EXPECTATIONS

A work environment where there is effective leadership and support that helps employees know what they need to do, how their work contributes to the organization, and whether there are impending changes.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF3: Clear Leadership & Expectations. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190)
| 22% | 34% | 30% | 14% |

Ipsos Reid (n = 4307)
| 7% | 29% | 34% | 30% |

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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GM@W Overview Report

PF4: CIVILITY & RESPECT

A work environment where employees are respectful and considerate in their interactions with one another, as well as with customers, clients and the public.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF4: Civility & Respect. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190)

| 28% | 32% | 24% | 16% |

Ipsos Reid (n = 4307)

| 6% | 24% | 39% | 31% |

Serious Concerns = 5 to 9 **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16** **Relative Strengths** = 17 to 20**

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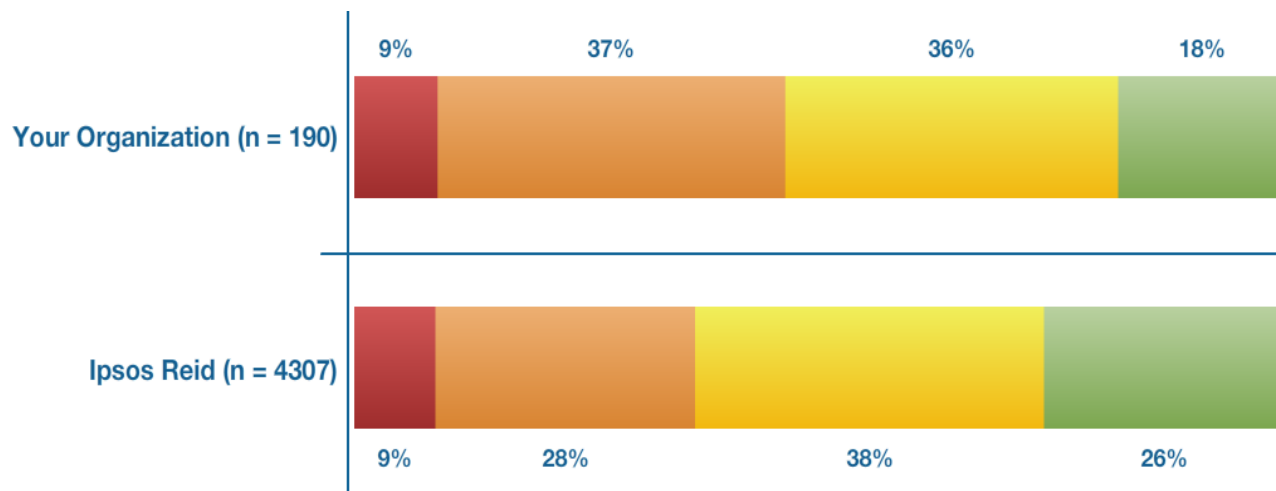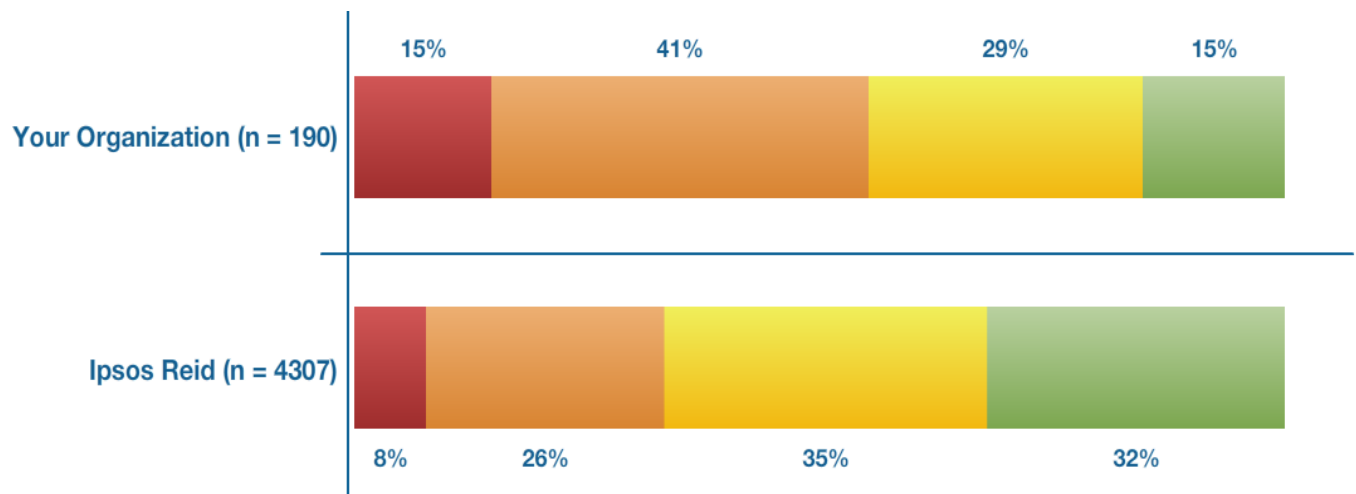**GM@W REPORT GENERATION DATE:** 2016-07-14 07:32:52

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PF5: PSYCHOLOGICAL COMPETENCIES & REQUIREMENTS

A work environment where there is a good fit between employees' interpersonal and emotional competencies and the requirements of the position they hold.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF5: Psychological Competencies & Requirements. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190)	6%	44%	34%	16%
Ipsos Reid (n = 4307)	3%	21%	40%	36%

Serious Concerns = 5 to 9 **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16** **Relative Strengths** = 17 to 20**

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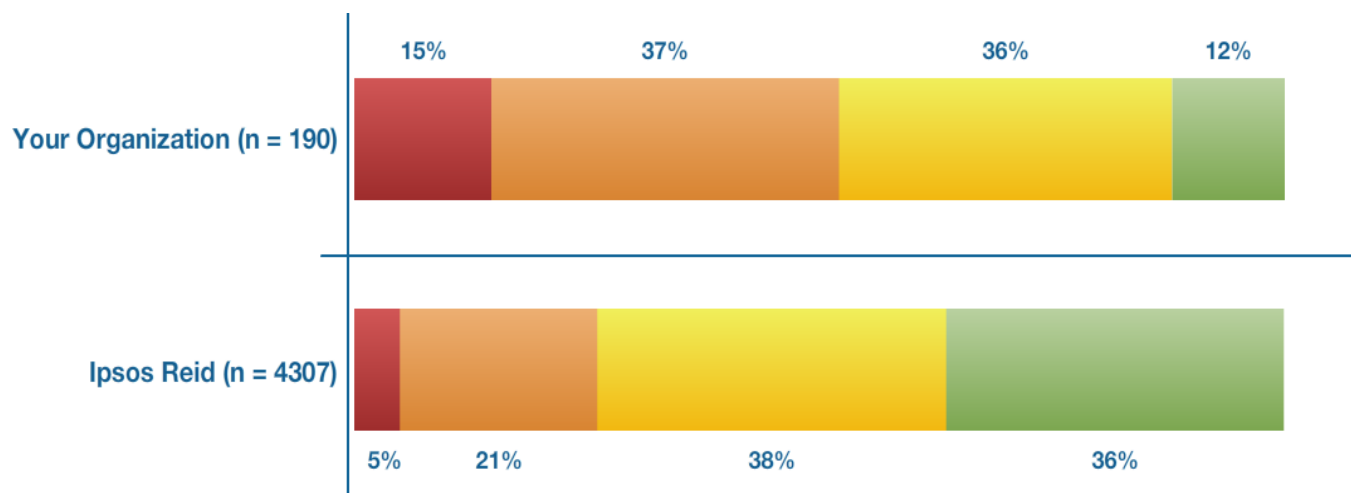**GM@W REPORT GENERATION DATE:** 2016-07-14 07:32:52

PF6: GROWTH & DEVELOPMENT

A work environment where employees receive encouragement and support in the development of their interpersonal, emotional and job skills.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF6: Growth & Development. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

9%	37%	36%	18%

Your Organization (n = 190)

Ipsos Reid (n = 4307)

9%	28%	38%	26%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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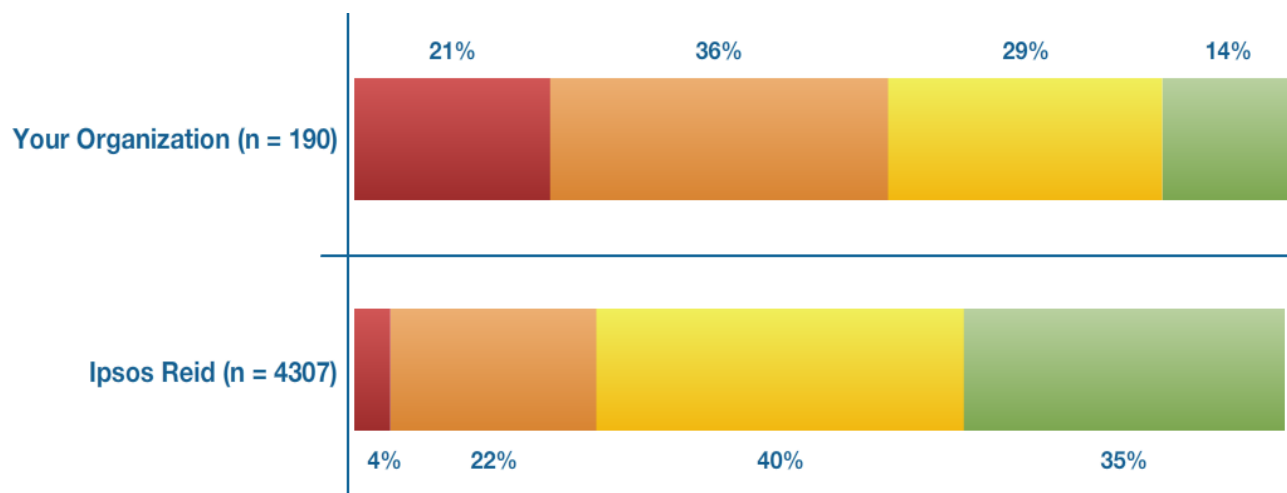**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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PF7: RECOGNITION & REWARD

A work environment where there is appropriate acknowledgement and appreciation of employees' efforts in a fair and timely manner.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF7: Recognition & Reward. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190): 15% | 41% | 29% | 15%

Ipsos Reid (n = 4307): 8% | 26% | 35% | 32%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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PF8: INVOLVEMENT & INFLUENCE

A work environment where employees are included in discussions about how their work is done and how important decisions are made.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF8: Involvement & Influence. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190)

| 15% | 37% | 36% | 12% |

Ipsos Reid (n = 4307)

| 5% | 21% | 38% | 36% |

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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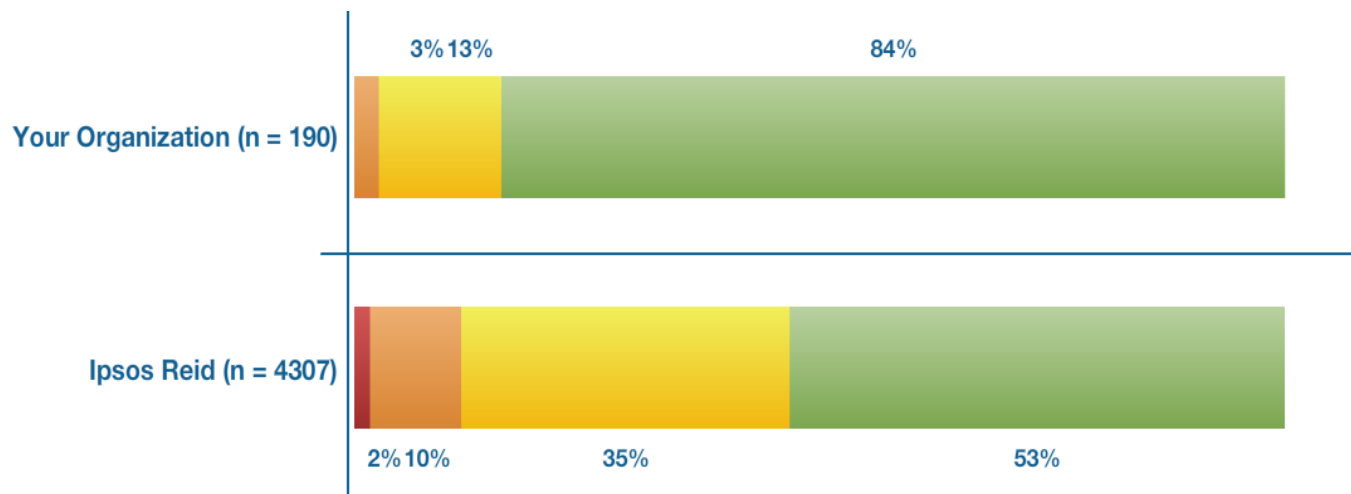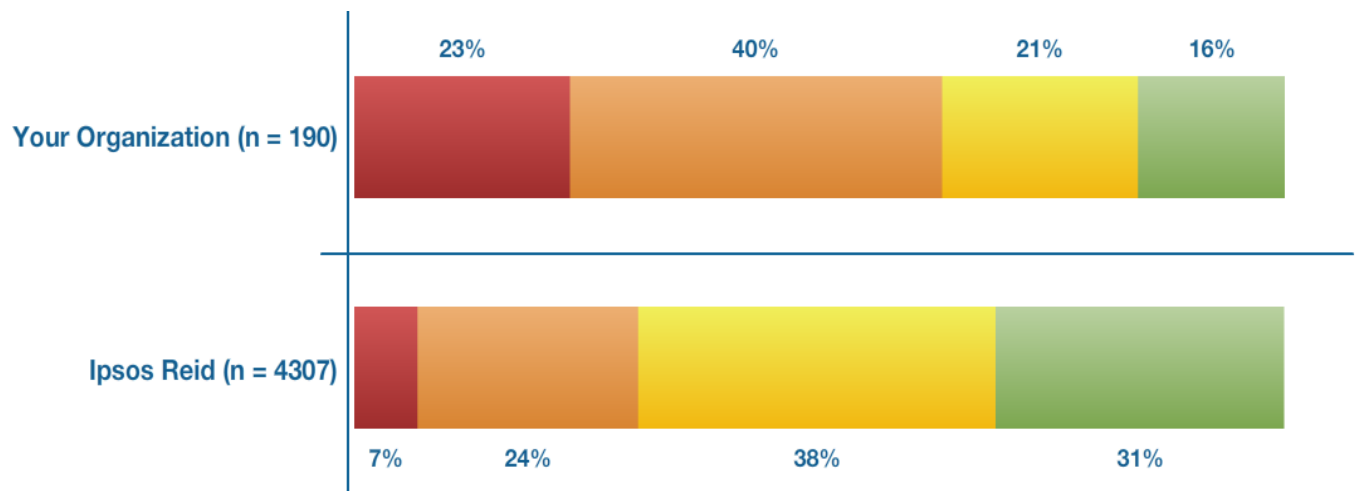**GM@W REPORT GENERATION DATE:** 2016-07-14 07:32:52

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PF9: WORKLOAD MANAGEMENT

A work environment where tasks and responsibilities can be accomplished successfully within the time available.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF9: Workload Management. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

	Serious Concerns	Significant Concerns	Minimal Concerns	Relative Strengths
Your Organization (n = 190)	21%	36%	29%	14%
Ipsos Reid (n = 4307)	4%	22%	40%	35%

Serious Concerns = 5 to 9 **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16** **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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ORGANIZATIONAL REPRESENTATIVE: Kelly Williams-Whitt
GM@W ONLINE SURVEY NAME: Palliser Survey 2016
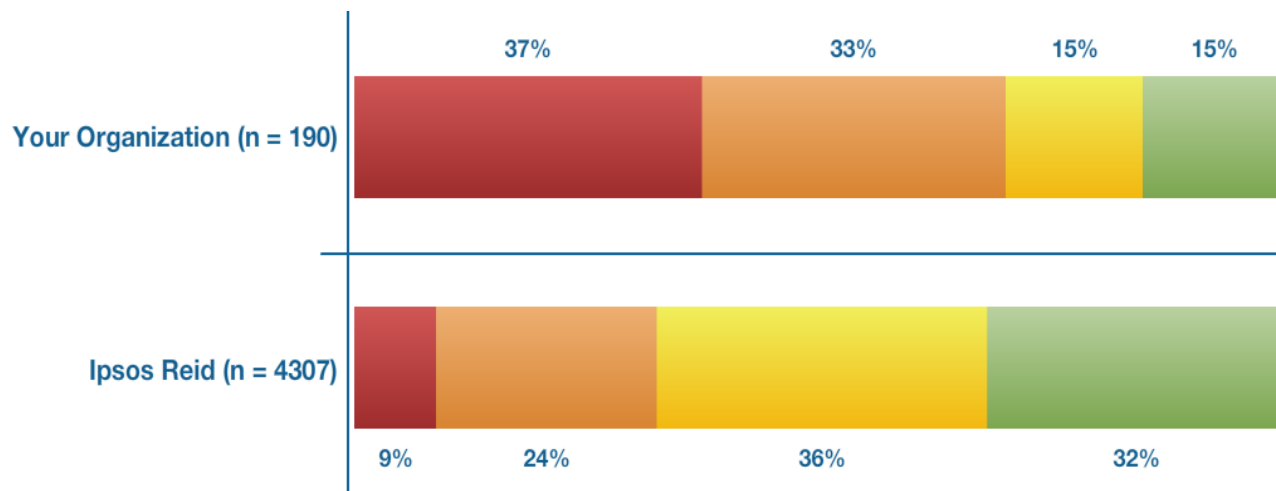**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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PF10: ENGAGEMENT

A work environment where employees feel connected to their work and are motivated to do their job well.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF10: Engagement. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190): 3% 13% 84%

Ipsos Reid (n = 4307): 2% 10% 35% 53%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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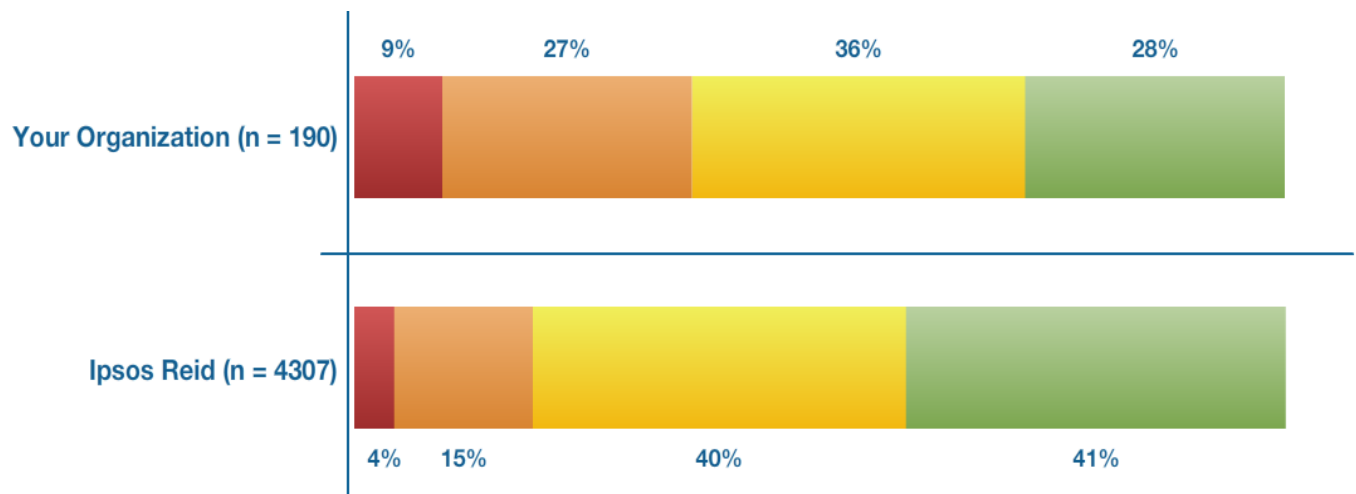**GM@W REPORT GENERATION DATE:** 2016-07-14 07:32:52

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PF11: BALANCE

A work environment where there is recognition of the need for balance between the demands of work, family and personal life.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF11: Balance. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190)	23%	40%	21%	16%
Ipsos Reid (n = 4307)	7%	24%	38%	31%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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PF12: PSYCHOLOGICAL PROTECTION

A work environment where employees' psychological safety is ensured.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF12: Psychological Protection. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

	37%	33%	15%	15%
Your Organization (n = 190)				

	9%	24%	36%	32%
Ipsos Reid (n = 4307)				

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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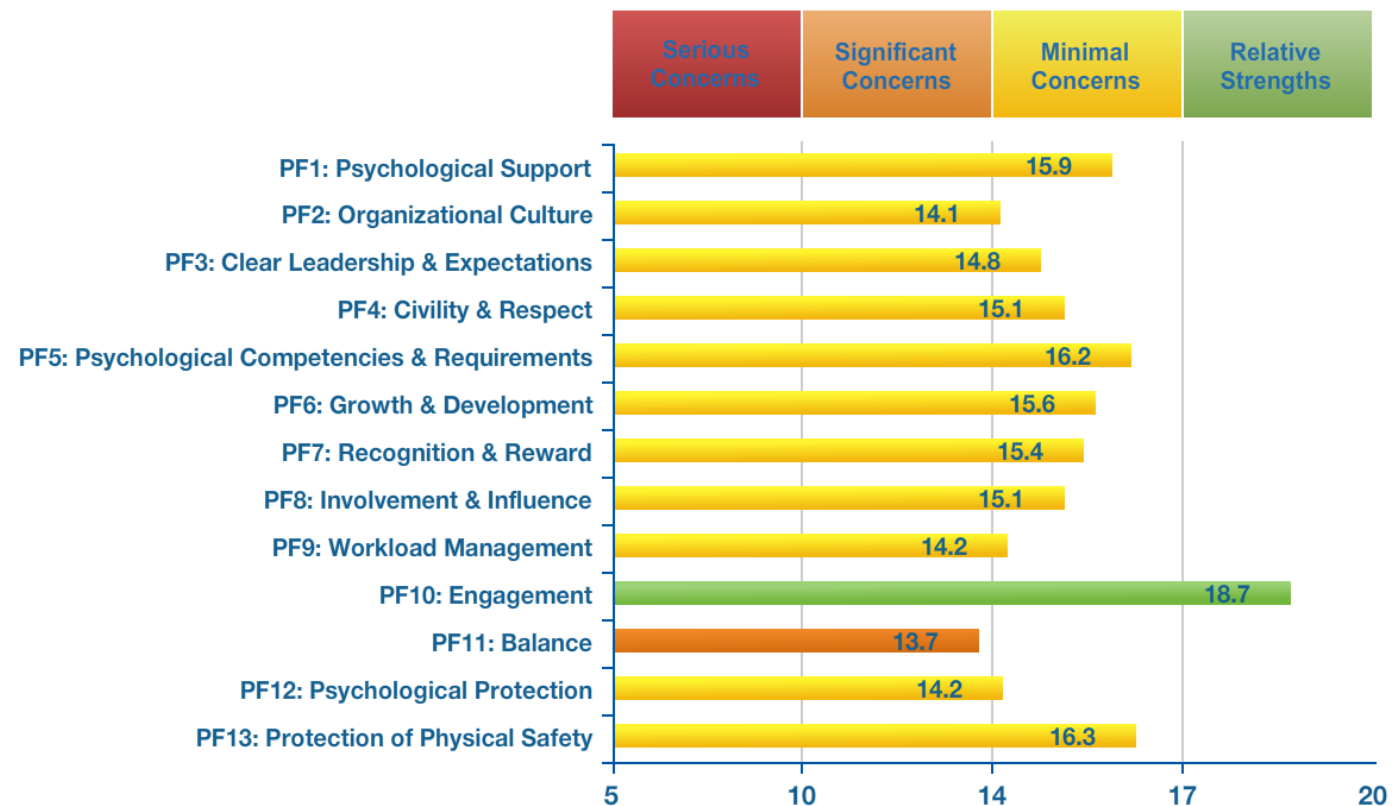**GM@W ONLINE SURVEY NAME:** Palliser Survey 2016
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PF13: PROTECTION OF PHYSICAL SAFETY

A work environment where management takes appropriate action to protect the physical safety of employees.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF13: Protection of Physical Safety. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 190)	9%	27%	36%	28%

Ipsos Reid (n = 4307)	4%	15%	40%	41%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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ORGANIZATION INFORMATION

Total number of employees, company-wide	500+
Number of employees to whom this GM@W Online Survey was delivered	500+
Number of employees who completed this GM@W Online Survey (total number of employee respondents)	117
Type of Organization	Not-for-profit, Public Sector, Mixed
Industry sector	Educational services

EMPLOYEE DEMOGRAPHIC RESULTS

Department/Branch	Percentage of Total Employee Respondents (n = 117)
School - Faith-Based	100%

GM@W Overview Report

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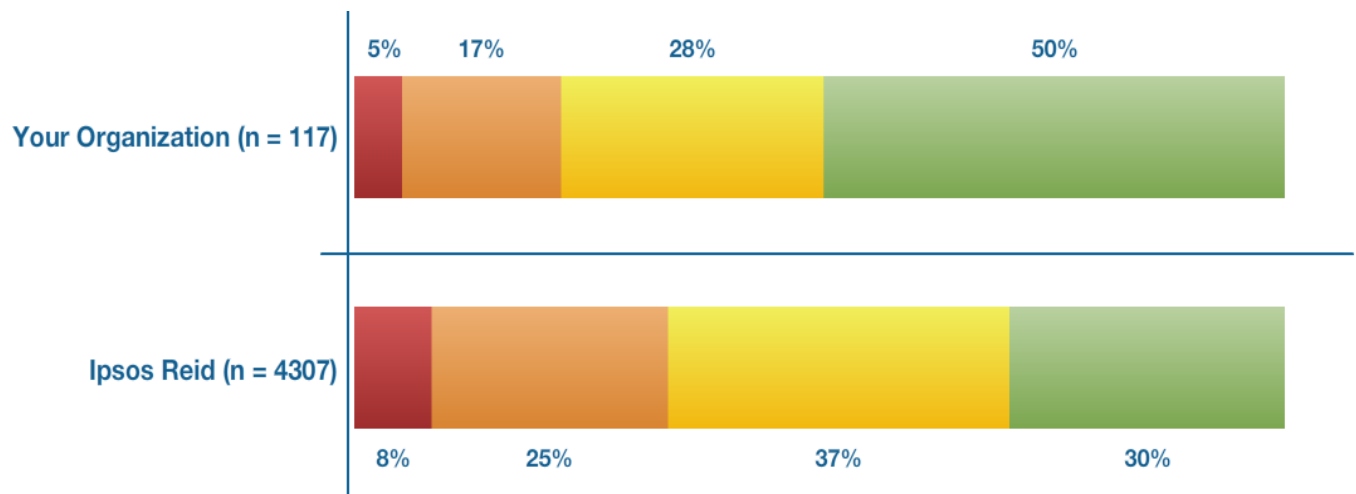**GM@W REPORT GENERATION DATE:** 2016-07-14 07:41:35

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MEAN RESPONSE BY PSYCHOSOCIAL FACTOR

The following graph presents your organization's GM@W Survey Results at a glance. Please note any areas of concern or relative strength within your organization. Psychosocial Factors flagged as Significant Concerns should be your top priority.

	Serious Concerns	Significant Concerns	Minimal Concerns	Relative Strengths
PF1: Psychological Support			15.9	
PF2: Organizational Culture			14.1	
PF3: Clear Leadership & Expectations			14.8	
PF4: Civility & Respect			15.1	
PF5: Psychological Competencies & Requirements			16.2	
PF6: Growth & Development			15.6	
PF7: Recognition & Reward			15.4	
PF8: Involvement & Influence			15.1	
PF9: Workload Management			14.2	
PF10: Engagement				18.7
PF11: Balance		13.7		
PF12: Psychological Protection			14.2	
PF13: Protection of Physical Safety			16.3	

Graph axis: 5 10 14 17 20

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13** Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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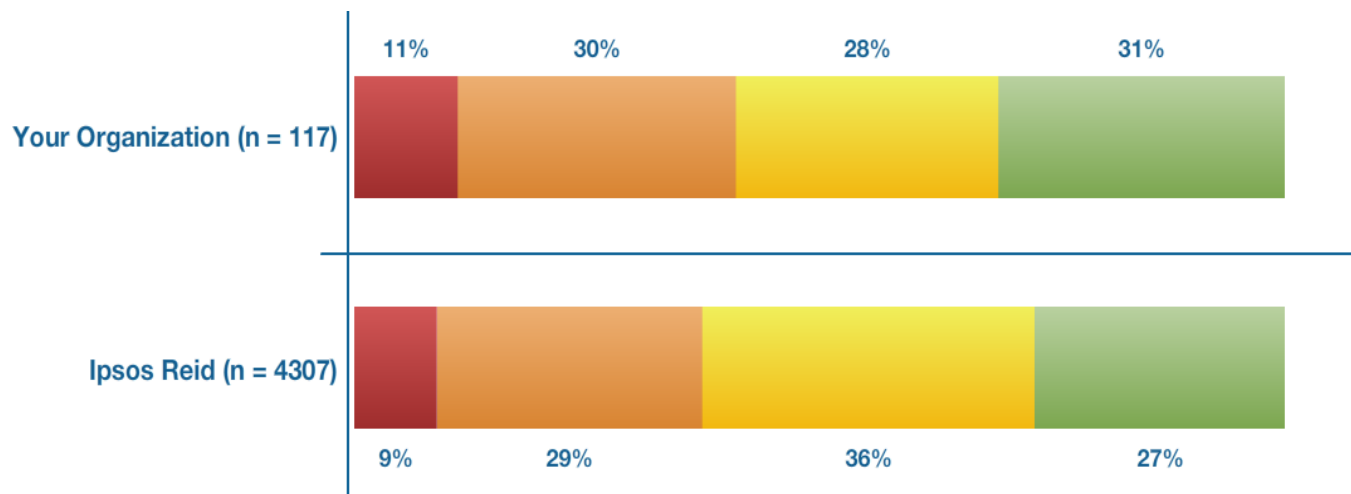**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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SPECIFIC AREAS OF CONCERN

Here are the results for the specific areas of concern questions for your organization.
The corresponding results of the 2012 national Ipsos Reid survey are presented below for comparison.

RESULTS FROM YOUR ORGANIZATION (n = 117 Respondents)

4.3% (n = 5) of employees reported experiencing discrimination in the workplace because of their
cultural/ethnic background, disability, sexual orientation, gender or age.

11.1% (n = 13) of employees reported being bullied or harassed, either verbally, physically or sexually in the workplace.

1.7% (n = 2) of employees reported being treated unfairly in the workplace because they have a mental illness.

RESULTS FROM IPSOS REID SURVEY (n = 4307 Respondents)

5.5% (n = 236) of respondents reported experiencing discrimination in the workplace because of their
cultural/ethnic background, disability, sexual orientation, gender or age.

6.7% (n = 289) of respondents reported being bullied or harassed, either verbally, physically or sexually in the workplace.

1.3% (n = 54) of reported being treated unfairly in the workplace because
they have a mental illness.

In May and June 2012,Ipsos Reid was commissioned by GM@W to conduct a public opinion survey on
psychosocial risks in Canadian workplaces using the GM@W Survey.
In total, 4307 working Canadians across a nationally representative sample of industries
and geographical regions completed the GM@W Survey.

GM@W Overview Report

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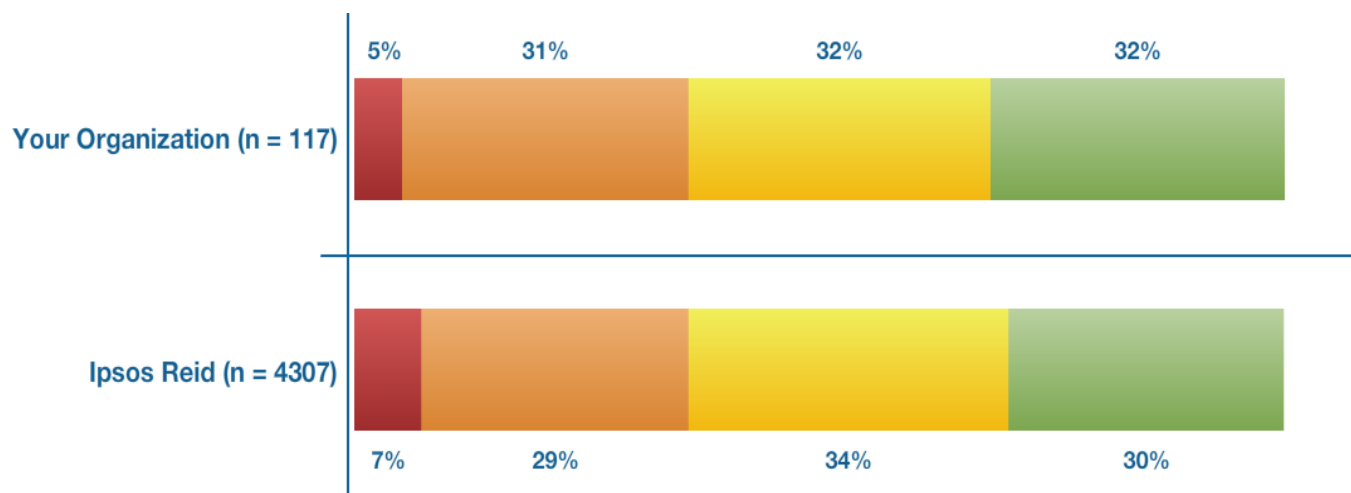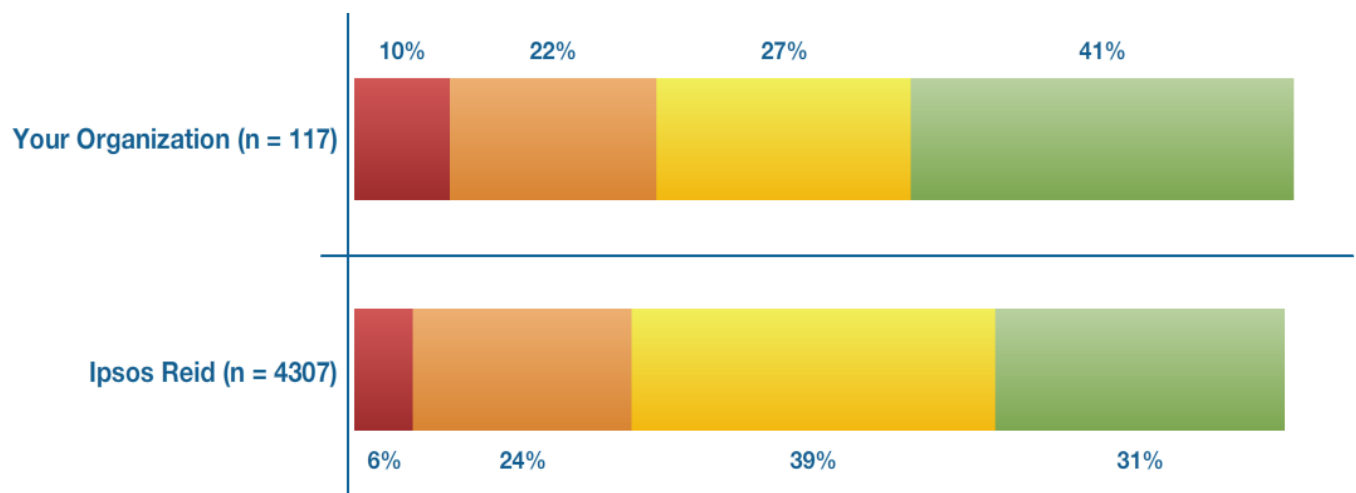**GM@W REPORT GENERATION DATE:** 2016-07-14 07:41:35

PF1: PSYCHOLOGICAL SUPPORT

A work environment where coworkers and supervisors are supportive of employees' psychological and mental health concerns, and respond appropriately as needed.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF1: Psychological Support. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117)	5%	17%	28%	50%

Ipsos Reid (n = 4307)	8%	25%	37%	30%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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PF2: ORGANIZATIONAL CULTURE

A work environment characterized by trust, honesty and fairness.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF2: Organizational Culture. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117)	11%	30%	28%	31%
Ipsos Reid (n = 4307)	9%	29%	36%	27%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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PF3: CLEAR LEADERSHIP & EXPECTATIONS

A work environment where there is effective leadership and support that helps employees know what they need to do, how their work contributes to the organization, and whether there are impending changes.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF3: Clear Leadership & Expectations. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

	Your Organization (n = 117)			
	5%	31%	32%	32%

	Ipsos Reid (n = 4307)			
	7%	29%	34%	30%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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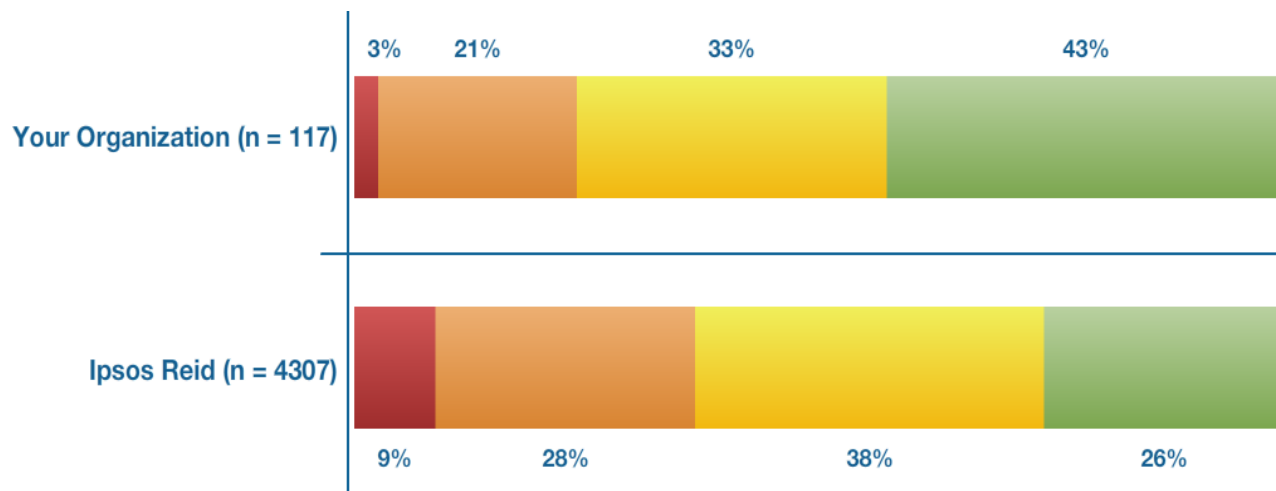**GM@W REPORT GENERATION DATE:** 2016-07-14 07:41:35

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PF4: CIVILITY & RESPECT

A work environment where employees are respectful and considerate in their interactions with one another, as well as with customers, clients and the public.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF4: Civility & Respect. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117)
- 10%
- 22%
- 27%
- 41%

Ipsos Reid (n = 4307)
- 6%
- 24%
- 39%
- 31%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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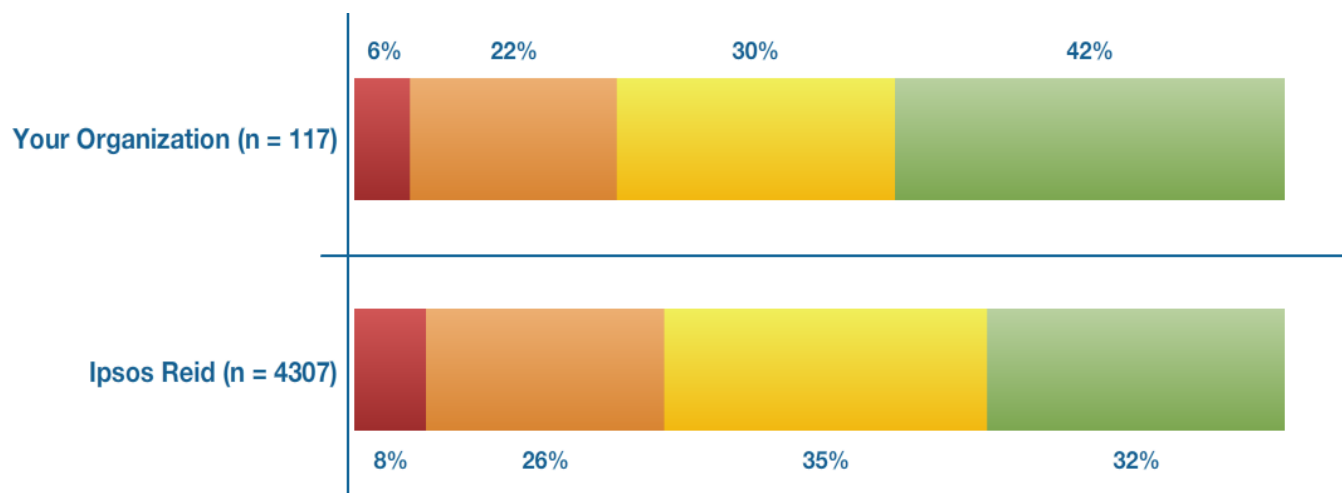**GM@W REPORT GENERATION DATE:** 2016-07-14 07:41:35

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PF5: PSYCHOLOGICAL COMPETENCIES & REQUIREMENTS

A work environment where there is a good fit between employees' interpersonal and emotional competencies and the requirements of the position they hold.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF5: Psychological Competencies & Requirements. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117)	3%	15%	32%	50%

Ipsos Reid (n = 4307)	3%	21%	40%	36%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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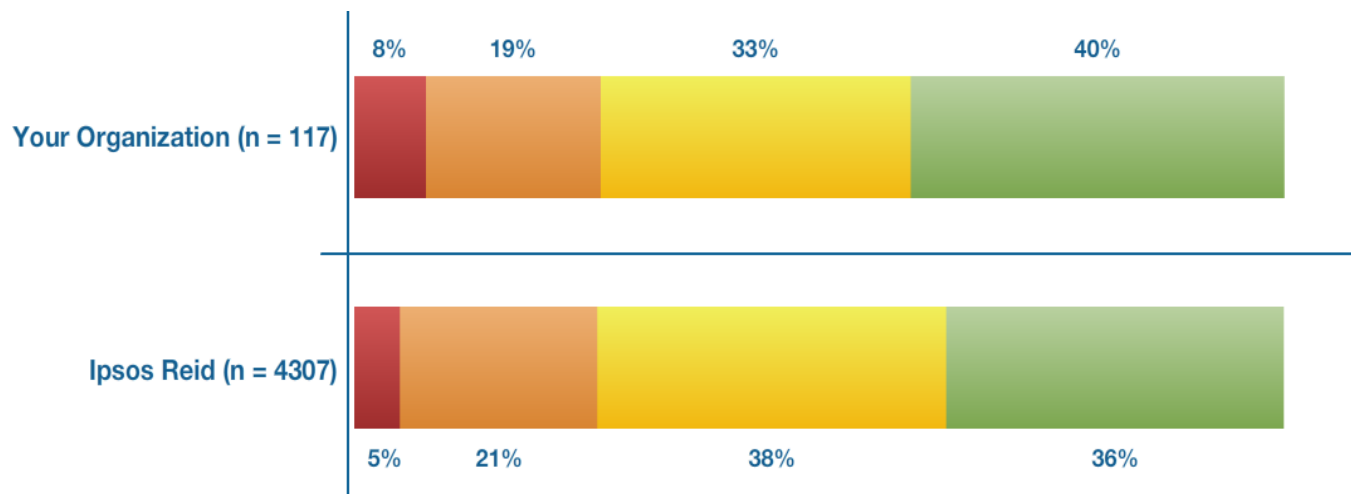**GM@W REPORT GENERATION DATE:** 2016-07-14 07:41:35

PF6: GROWTH & DEVELOPMENT

A work environment where employees receive encouragement and support in the development of their interpersonal, emotional and job skills.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF6: Growth & Development. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117): 3% | 21% | 33% | 43%

Ipsos Reid (n = 4307): 9% | 28% | 38% | 26%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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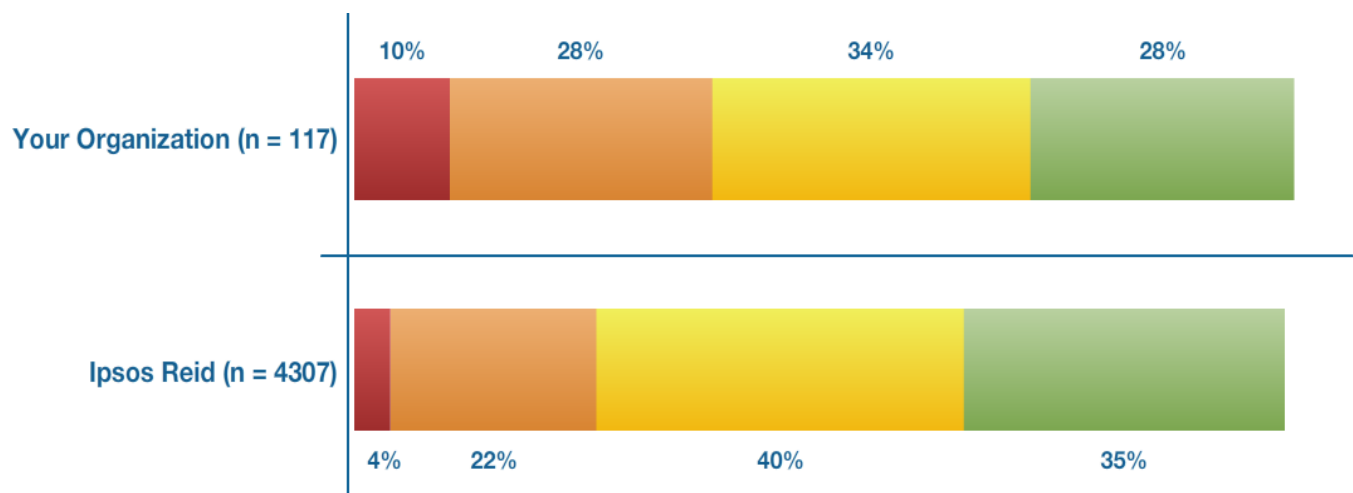**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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PF7: RECOGNITION & REWARD

A work environment where there is appropriate acknowledgement and appreciation of employees' efforts in a fair and timely manner.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF7: Recognition & Reward. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117)
6% 22% 30% 42%

Ipsos Reid (n = 4307)
8% 26% 35% 32%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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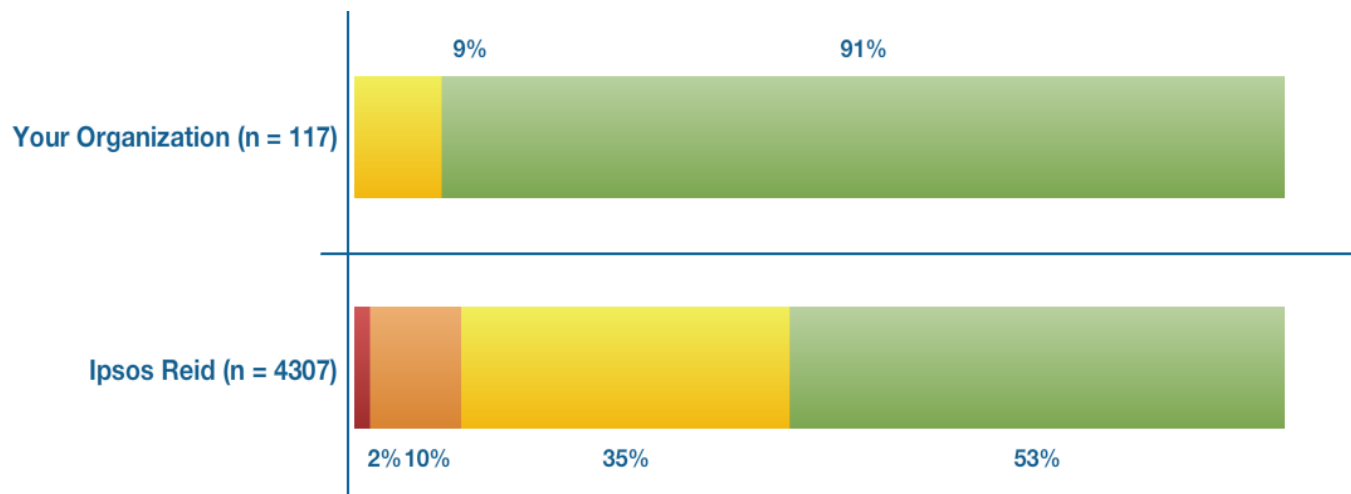**GM@W REPORT GENERATION DATE:** 2016-07-14 07:41:35

PF8: INVOLVEMENT & INFLUENCE

A work environment where employees are included in discussions about how their work is done and how important decisions are made.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF8: Involvement & Influence. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

	Serious Concerns	Significant Concerns	Minimal Concerns	Relative Strengths
Your Organization (n = 117)	8%	19%	33%	40%
Ipsos Reid (n = 4307)	5%	21%	38%	36%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

*Although this is a Minimal Concern, it is important to attend to it and review the GM@W Organizational Review Results and the GM@W Survey Results for any additional or individual-identified areas of concern.

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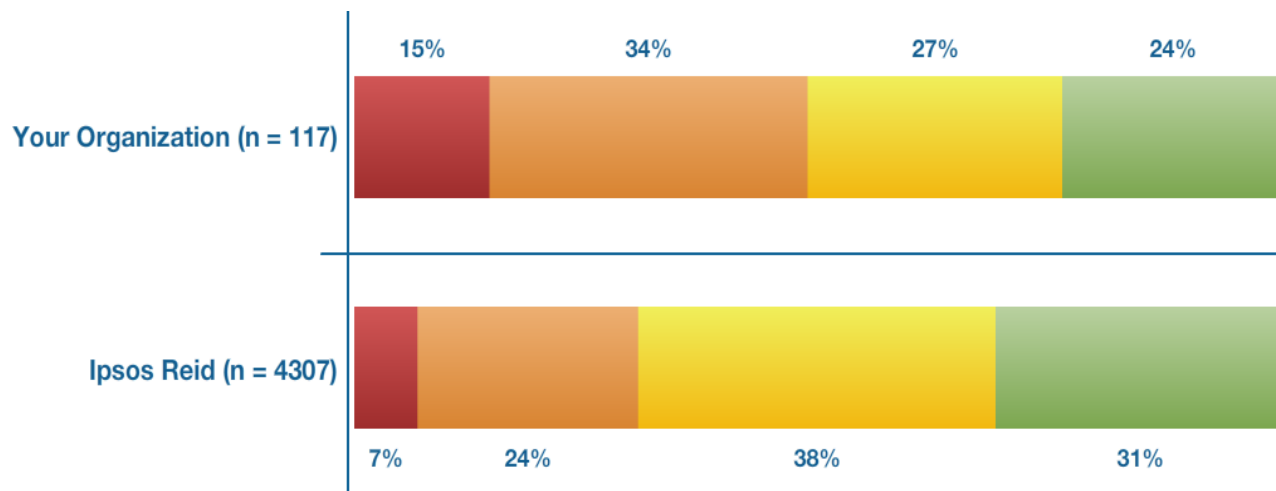**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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PF9: WORKLOAD MANAGEMENT

A work environment where tasks and responsibilities can be accomplished successfully within the time available.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF9: Workload Management. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117)

| 10% | 28% | 34% | 28% |

Ipsos Reid (n = 4307)

| 4% | 22% | 40% | 35% |

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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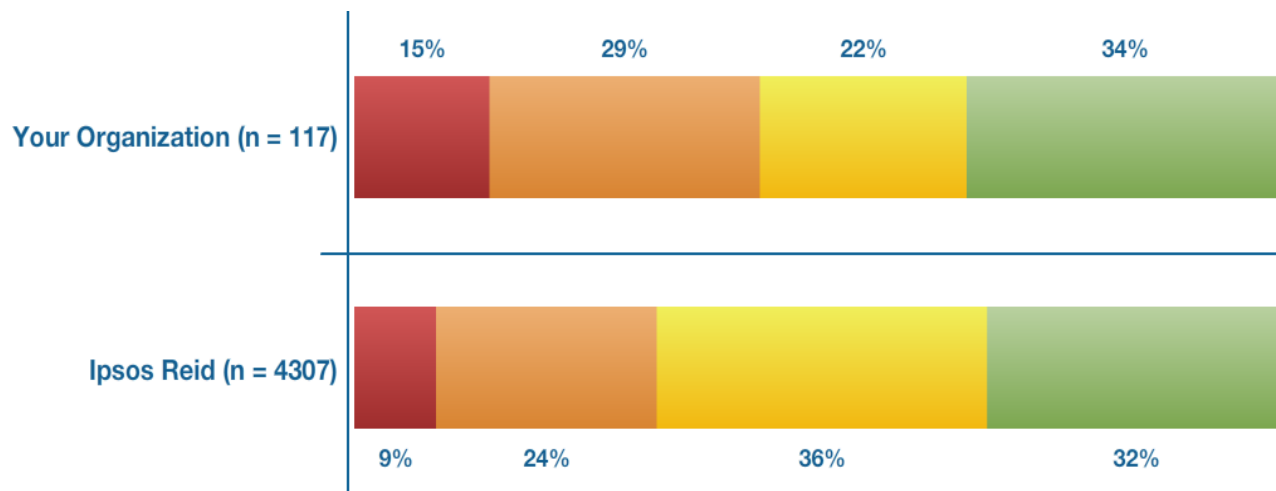**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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PF10: ENGAGEMENT

A work environment where employees feel connected to their work and are motivated to do their job well.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF10: Engagement. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117): 9% | 91%

Ipsos Reid (n = 4307): 2% 10% | 35% | 53%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

*Although this is a Minimal Concern, it is important to attend to it and review the GM@W Organizational Review Results and the GM@W Survey Results for any additional or individual-identified areas of concern.

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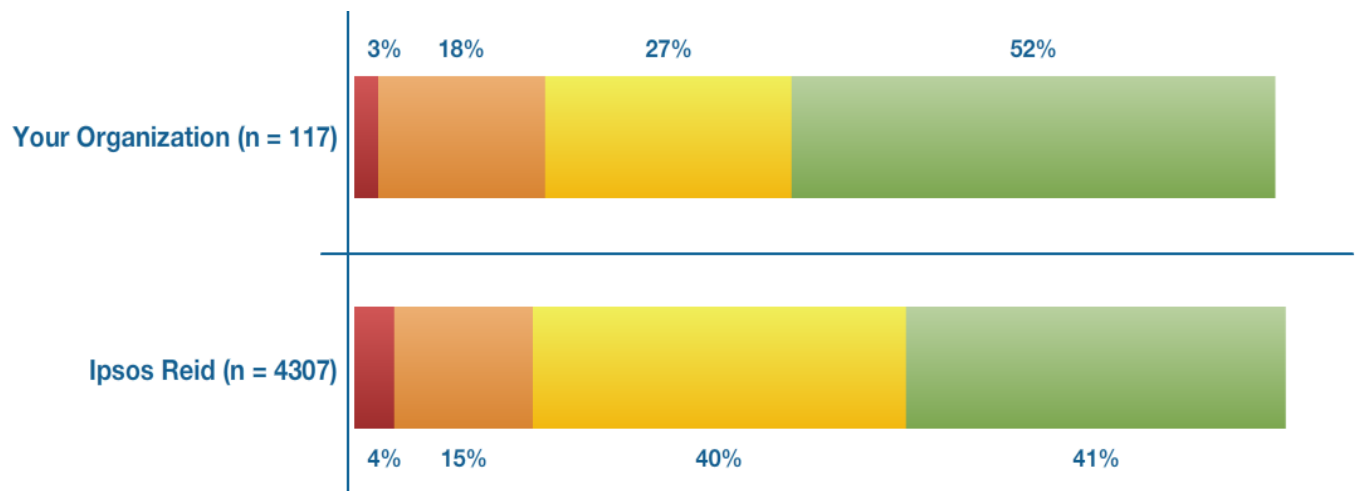**GM@W REPORT GENERATION DATE:** 2016-07-14 07:41:35

PF11: BALANCE

A work environment where there is recognition of the need for balance between the demands of work, family and personal life.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF11: Balance. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117)

| 15% | 34% | 27% | 24% |

Ipsos Reid (n = 4307)

| 7% | 24% | 38% | 31% |

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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ORGANIZATIONAL REPRESENTATIVE: Kelly Williams-Whitt
GM@W ONLINE SURVEY NAME: Palliser Survey 2016
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PF12: PSYCHOLOGICAL PROTECTION

A work environment where employees' psychological safety is ensured.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF12: Psychological Protection. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117): 15% | 29% | 22% | 34%

Ipsos Reid (n = 4307): 9% | 24% | 36% | 32%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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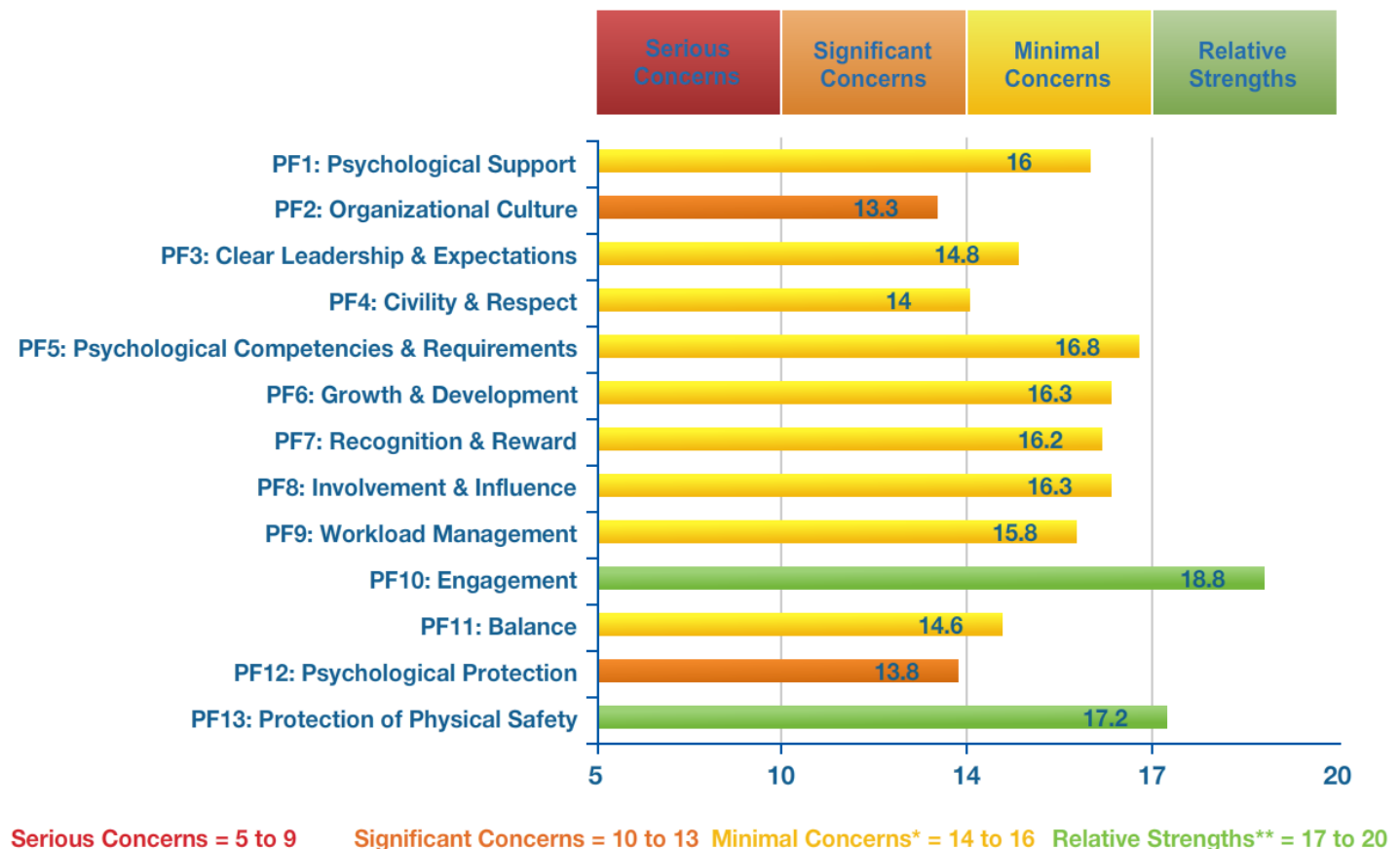**GM@W ONLINE SURVEY NAME:** Palliser Survey 2016
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PF13: PROTECTION OF PHYSICAL SAFETY

A work environment where management takes appropriate action to protect the physical safety of employees.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF13: Protection of Physical Safety. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 117)
3%   18%   27%   52%

Ipsos Reid (n = 4307)
4%   15%   40%   41%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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ORGANIZATION INFORMATION

Total number of employees, company-wide	500+
Number of employees to whom this GM@W Online Survey was delivered	500+
Number of employees who completed this GM@W Online Survey (total number of employee respondents)	29
Type of Organization	Not-for-profit, Public Sector, Mixed
Industry sector	Educational services

EMPLOYEE DEMOGRAPHIC RESULTS

Department/Branch	Percentage of Total Employee Respondents (n = 29)
Central Office	100%

GM@W Overview Report

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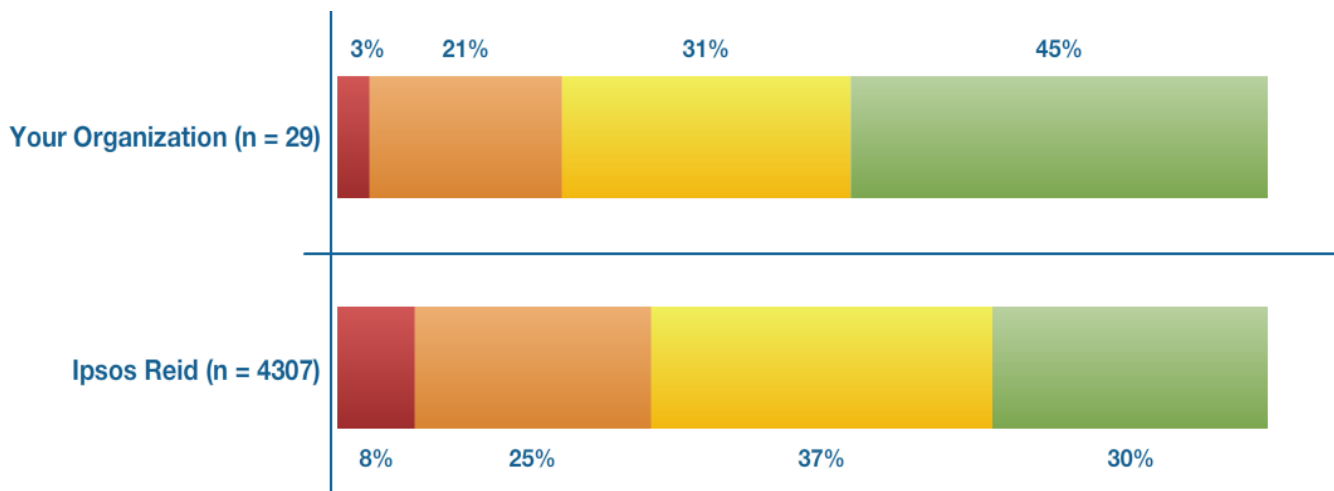**GM@W REPORT GENERATION DATE:** 2016-07-14 07:29:53

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MEAN RESPONSE BY PSYCHOSOCIAL FACTOR

The following graph presents your organization's GM@W Survey Results at a glance. Please note any areas of concern or relative strength within your organization. Psychosocial Factors flagged as Significant Concerns should be your top priority.

Serious Concerns	Significant Concerns	Minimal Concerns	Relative Strengths

Psychosocial Factor	Value
PF1: Psychological Support	16
PF2: Organizational Culture	13.3
PF3: Clear Leadership & Expectations	14.8
PF4: Civility & Respect	14
PF5: Psychological Competencies & Requirements	16.8
PF6: Growth & Development	16.3
PF7: Recognition & Reward	16.2
PF8: Involvement & Influence	16.3
PF9: Workload Management	15.8
PF10: Engagement	18.8
PF11: Balance	14.6
PF12: Psychological Protection	13.8
PF13: Protection of Physical Safety	17.2

Scale: 5, 10, 14, 17, 20

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths = 17 to 20**

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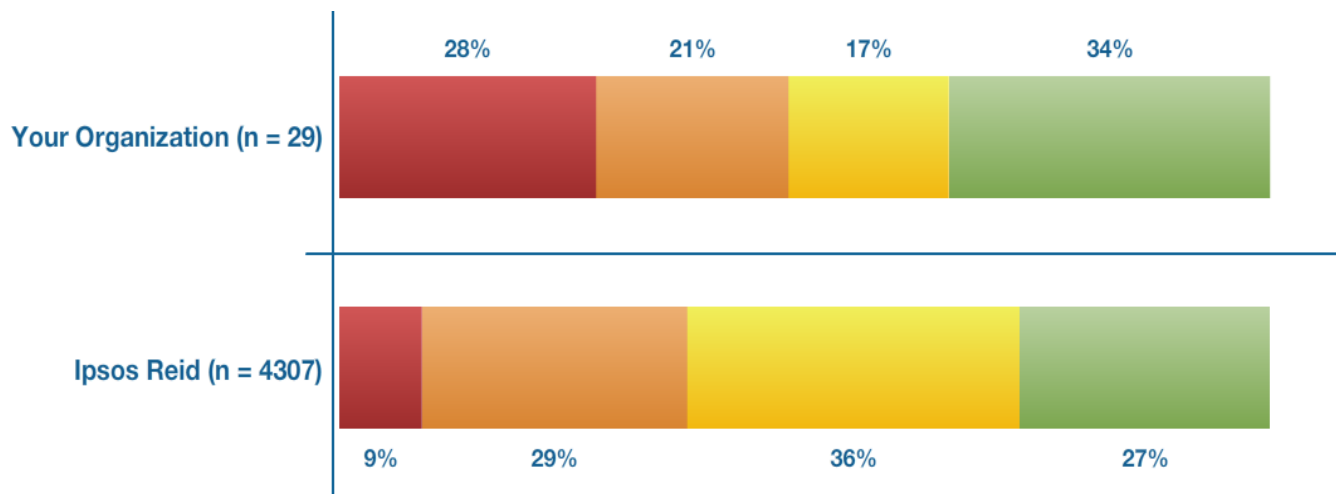**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
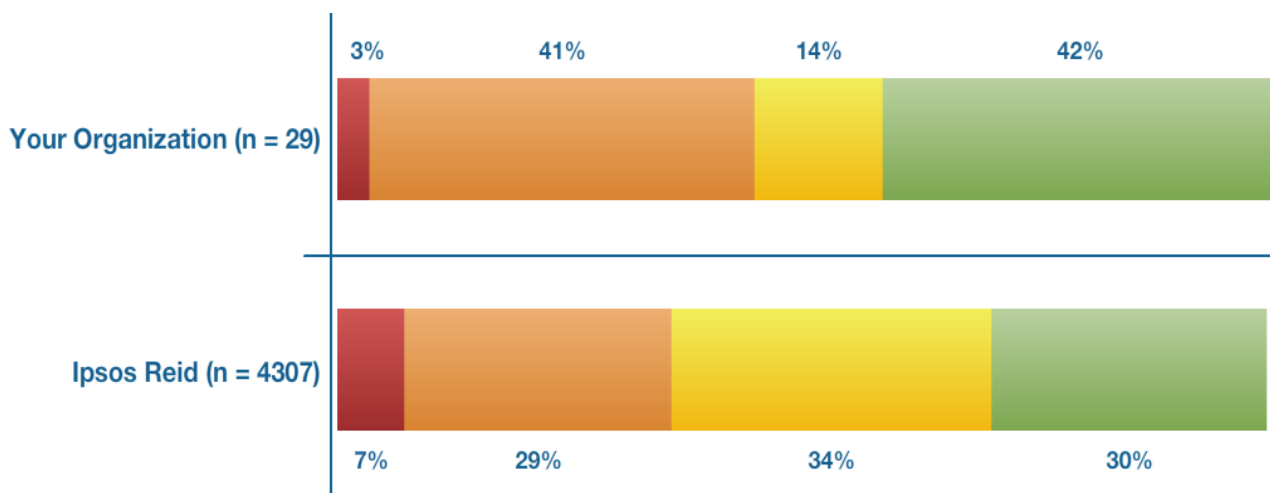**GM@W REPORT GENERATION DATE:** 2016-07-14 07:29:53

SPECIFIC AREAS OF CONCERN

Here are the results for the specific areas of concern questions for your organization.
The corresponding results of the 2012 national Ipsos Reid survey are presented below for comparison.

RESULTS FROM YOUR ORGANIZATION (n = 29 Respondents)

3.5% (n = 1) of employees reported experiencing discrimination in the workplace because of their
cultural/ethnic background, disability, sexual orientation, gender or age.

27.6% (n = 8) of employees reported being bullied or harassed, either verbally, physically or sexually in the workplace.

0% (n = 0) of employees reported being treated unfairly in the workplace because they have a mental illness.

RESULTS FROM IPSOS REID SURVEY (n = 4307 Respondents)

5.5% (n = 236) of respondents reported experiencing discrimination in the workplace because of their
cultural/ethnic background, disability, sexual orientation, gender or age.

6.7% (n = 289) of respondents reported being bullied or harassed, either verbally, physically or sexually in the workplace.

1.3% (n = 54) of reported being treated unfairly in the workplace because
they have a mental illness.

In May and June 2012,Ipsos Reid was commissioned by GM@W to conduct a public opinion survey on
psychosocial risks in Canadian workplaces using the GM@W Survey.
In total, 4307 working Canadians across a nationally representative sample of industries
and geographical regions completed the GM@W Survey.

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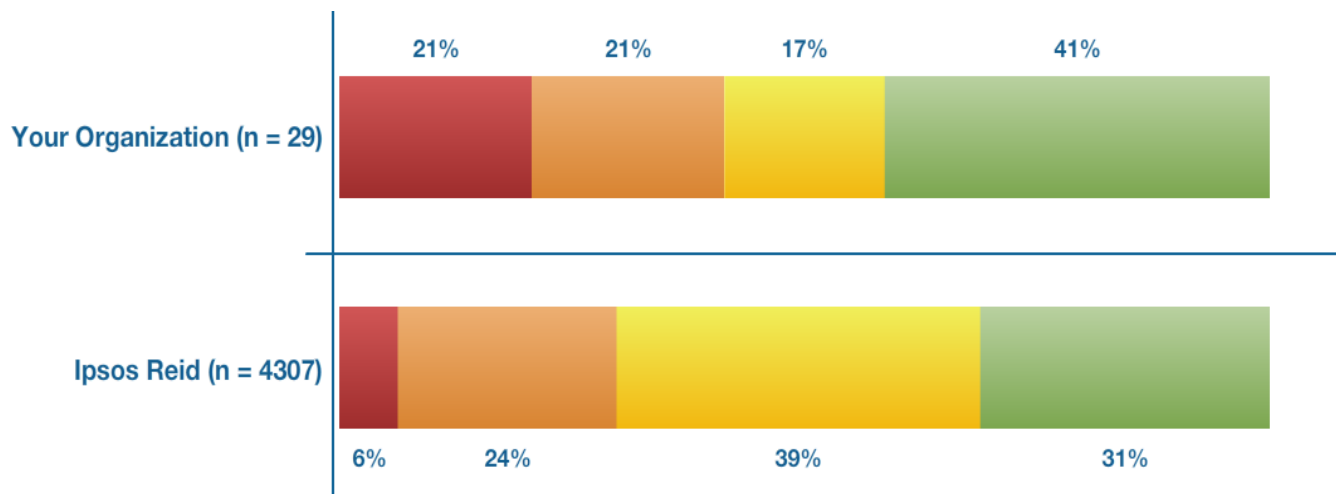**GM@W REPORT GENERATION DATE:** 2016-07-14 07:29:53

PF1: PSYCHOLOGICAL SUPPORT

A work environment where coworkers and supervisors are supportive of employees' psychological and mental health concerns, and respond appropriately as needed.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF1: Psychological Support. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29)
3% | 21% | 31% | 45%

Ipsos Reid (n = 4307)
8% | 25% | 37% | 30%

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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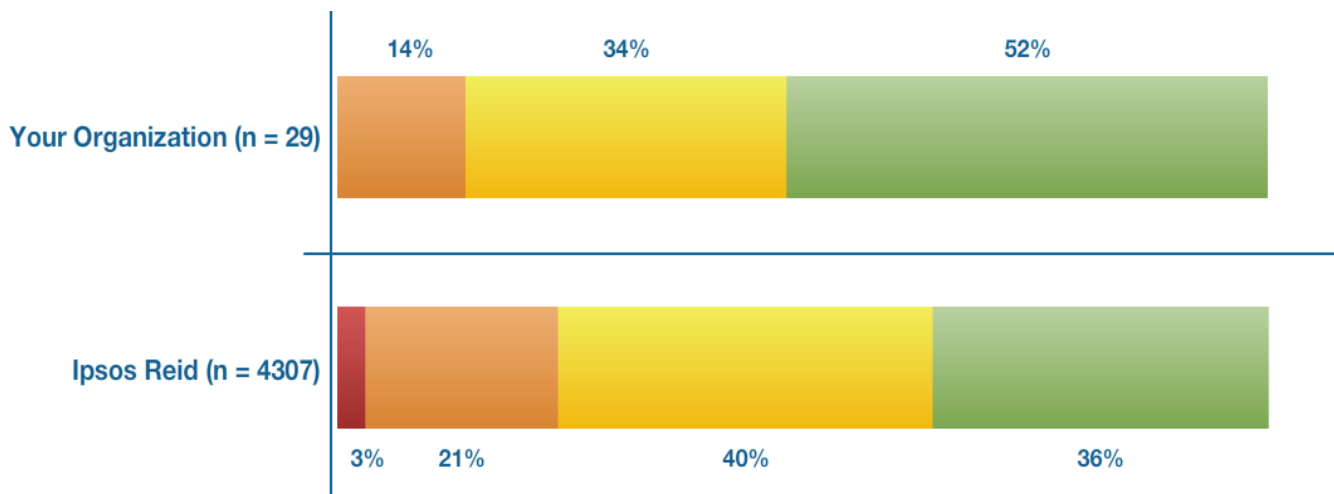**GM@W REPORT GENERATION DATE:** 2016-07-14 07:29:53

PF2: ORGANIZATIONAL CULTURE

A work environment characterized by trust, honesty and fairness.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF2: Organizational Culture. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29)

| 28% | 21% | 17% | 34% |

Ipsos Reid (n = 4307)

| 9% | 29% | 36% | 27% |

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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PF3: CLEAR LEADERSHIP & EXPECTATIONS

A work environment where there is effective leadership and support that helps employees know what they need to do, how their work contributes to the organization, and whether there are impending changes.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF3: Clear Leadership & Expectations. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29)

| 3% | 41% | 14% | 42% |

Ipsos Reid (n = 4307)

| 7% | 29% | 34% | 30% |

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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PF4: CIVILITY & RESPECT

A work environment where employees are respectful and considerate in their interactions with one another, as well as with customers, clients and the public.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF4: Civility & Respect. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

21%	21%	17%	41%

Your Organization (n = 29)

Ipsos Reid (n = 4307)

6%	24%	39%	31%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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GM@W Overview Report

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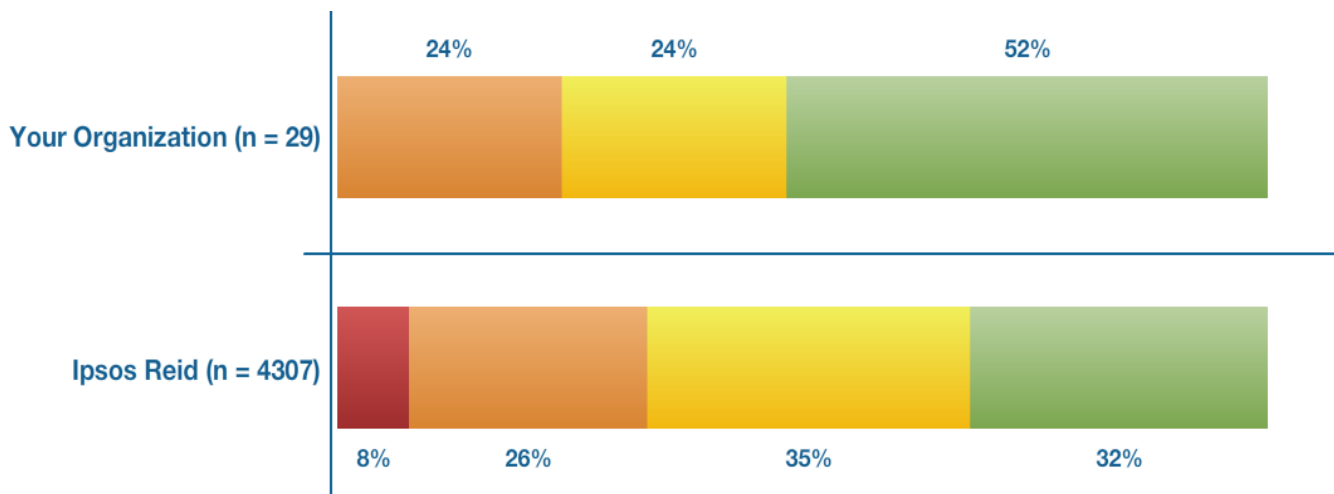**GM@W REPORT GENERATION DATE:** 2016-07-14 07:29:53

PF5: PSYCHOLOGICAL COMPETENCIES & REQUIREMENTS

A work environment where there is a good fit between employees' interpersonal and emotional competencies and the requirements of the position they hold.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF5: Psychological Competencies & Requirements. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29): 14% | 34% | 52%

Ipsos Reid (n = 4307): 3% | 21% | 40% | 36%

Serious Concerns = 5 to 9 **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16** **Relative Strengths** = 17 to 20**

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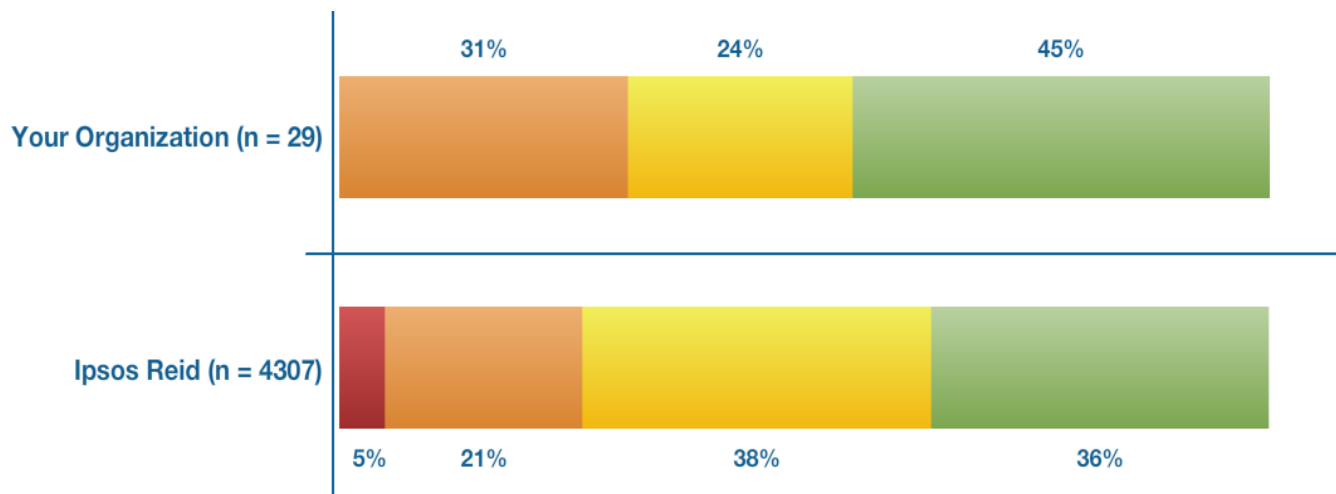**GM@W REPORT GENERATION DATE:** 2016-07-14 07:29:53

PF6: GROWTH & DEVELOPMENT

A work environment where employees receive encouragement and support in the development of their interpersonal, emotional and job skills.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF6: Growth & Development. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29): 17% | 34% | 49%

Ipsos Reid (n = 4307): 9% | 28% | 38% | 26%

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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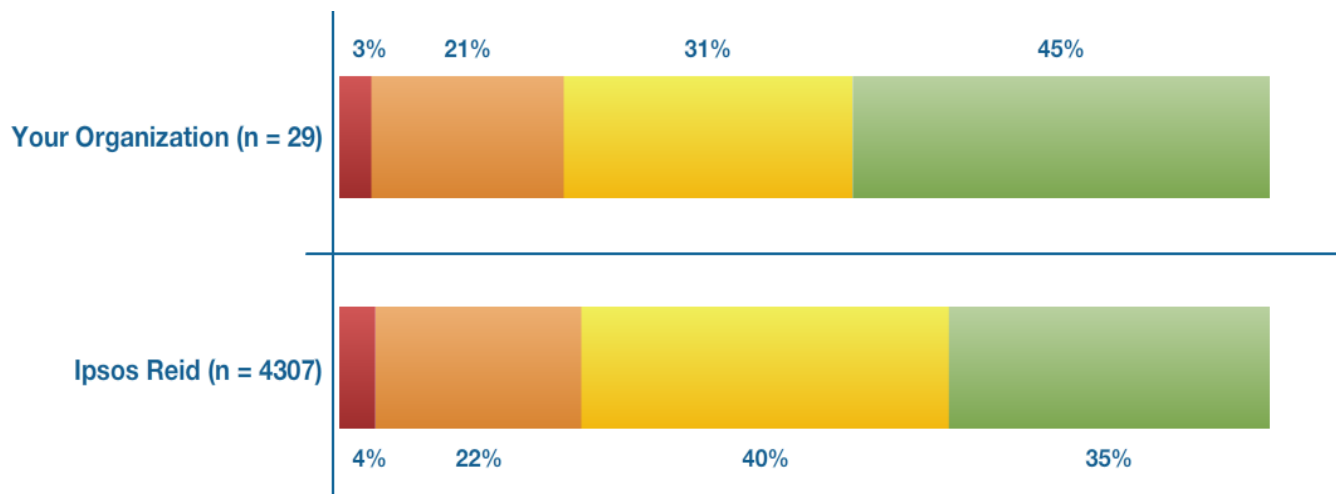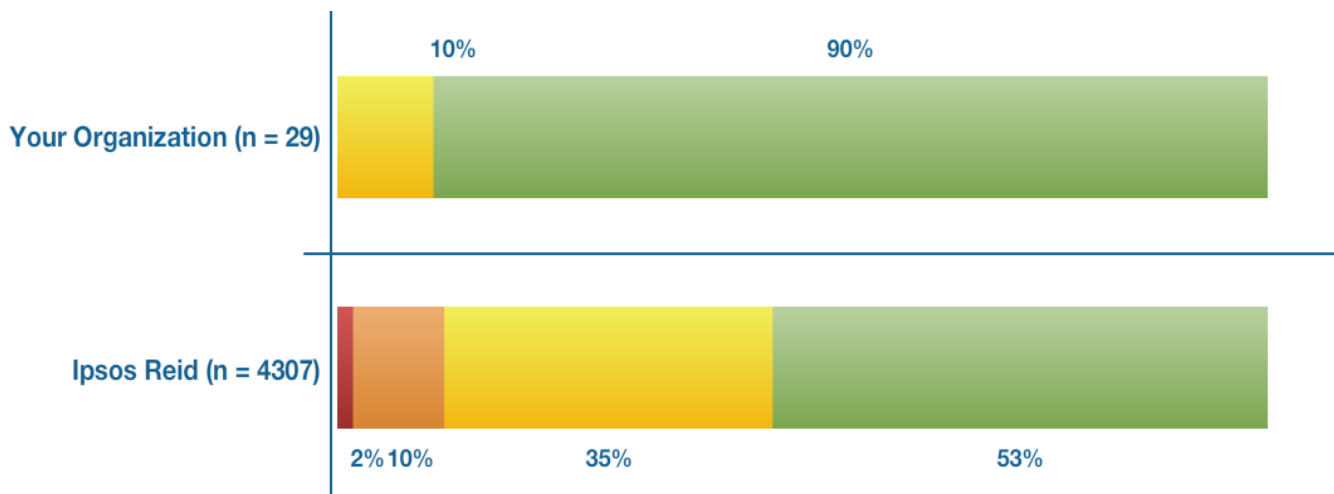**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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PF7: RECOGNITION & REWARD

A work environment where there is appropriate acknowledgement and appreciation of employees' efforts in a fair and timely manner.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF7: Recognition & Reward. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29)
24%   24%   52%

Ipsos Reid (n = 4307)
8%   26%   35%   32%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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PF8: INVOLVEMENT & INFLUENCE

A work environment where employees are included in discussions about how their work is done and how important decisions are made.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF8: Involvement & Influence. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29): 31% | 24% | 45%

Ipsos Reid (n = 4307): 5% | 21% | 38% | 36%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

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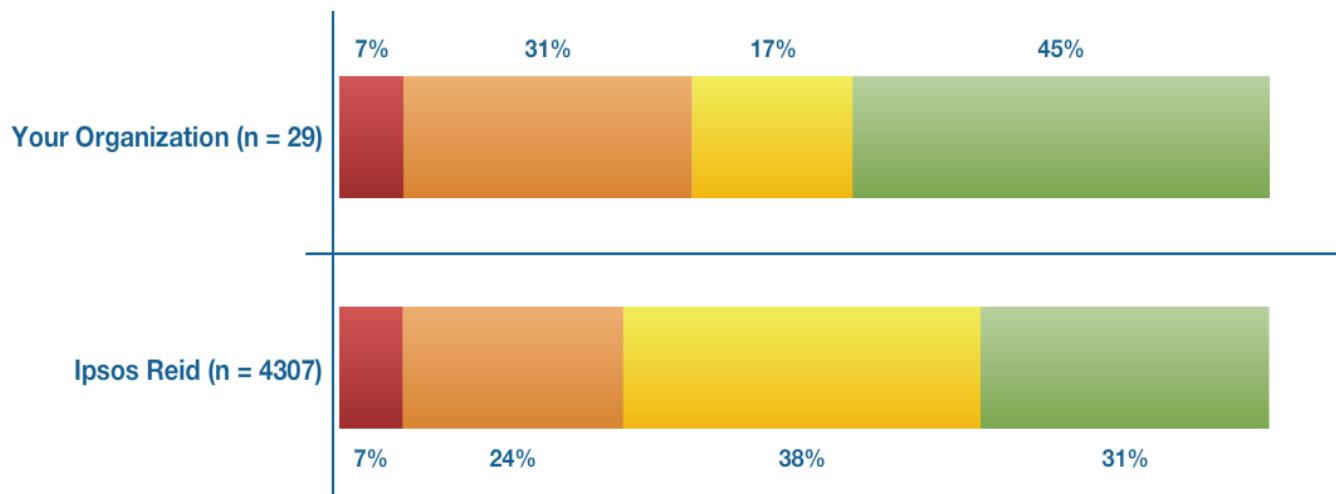**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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PF9: WORKLOAD MANAGEMENT

A work environment where tasks and responsibilities can be accomplished successfully within the time available.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF9: Workload Management. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29): 3% | 21% | 31% | 45%

Ipsos Reid (n = 4307): 4% | 22% | 40% | 35%

Serious Concerns = 5 to 9   **Significant Concerns = 10 to 13**   **Minimal Concerns* = 14 to 16**   **Relative Strengths** = 17 to 20**

*Although this is a Minimal Concern, it is important to attend to it and review the GM@W Organizational Review Results and the GM@W Survey Results for any additional or individual-identified areas of concern.

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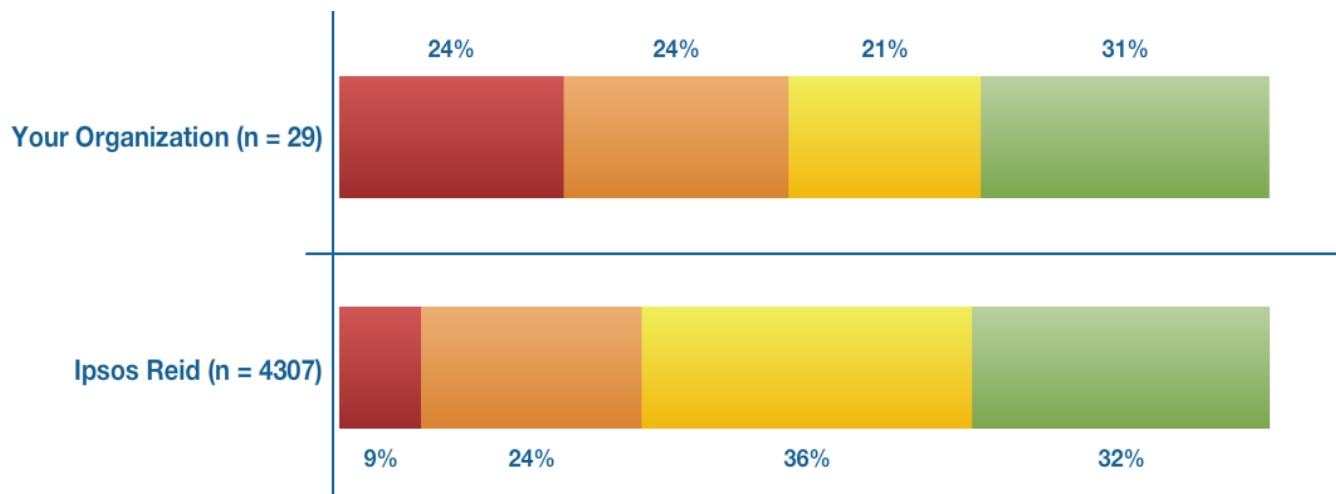**GM@W ONLINE SURVEY CLOSE DATE:** 2016-07-13 19:00:19
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PF10: ENGAGEMENT

A work environment where employees feel connected to their work and are motivated to do their job well.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF10: Engagement. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29)	10%	90%
Ipsos Reid (n = 4307)	2% 10% 35%	53%

Serious Concerns = 5 to 9　　**Significant Concerns = 10 to 13**　**Minimal Concerns* = 14 to 16**　**Relative Strengths** = 17 to 20**

*Although this is a Minimal Concern, it is important to attend to it and review the GM@W Organizational Review Results and the GM@W Survey Results for any additional or individual-identified areas of concern.

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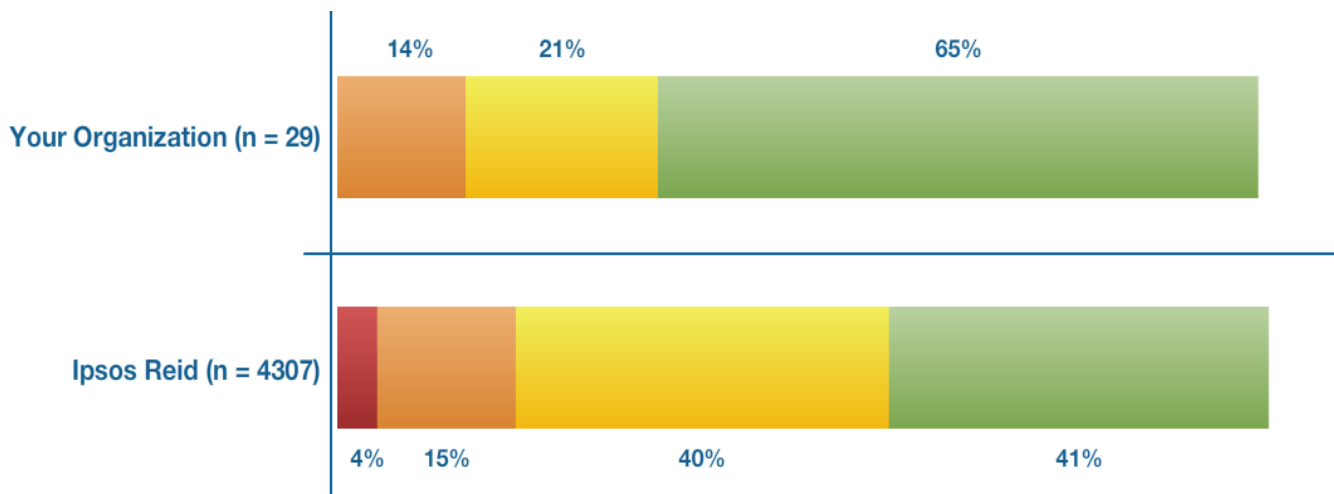**GM@W REPORT GENERATION DATE:** 2016-07-14 07:29:53

PF11: BALANCE

A work environment where there is recognition of the need for balance between the demands of work, family and personal life.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF11: Balance. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29)

| 7% | 31% | 17% | 45% |

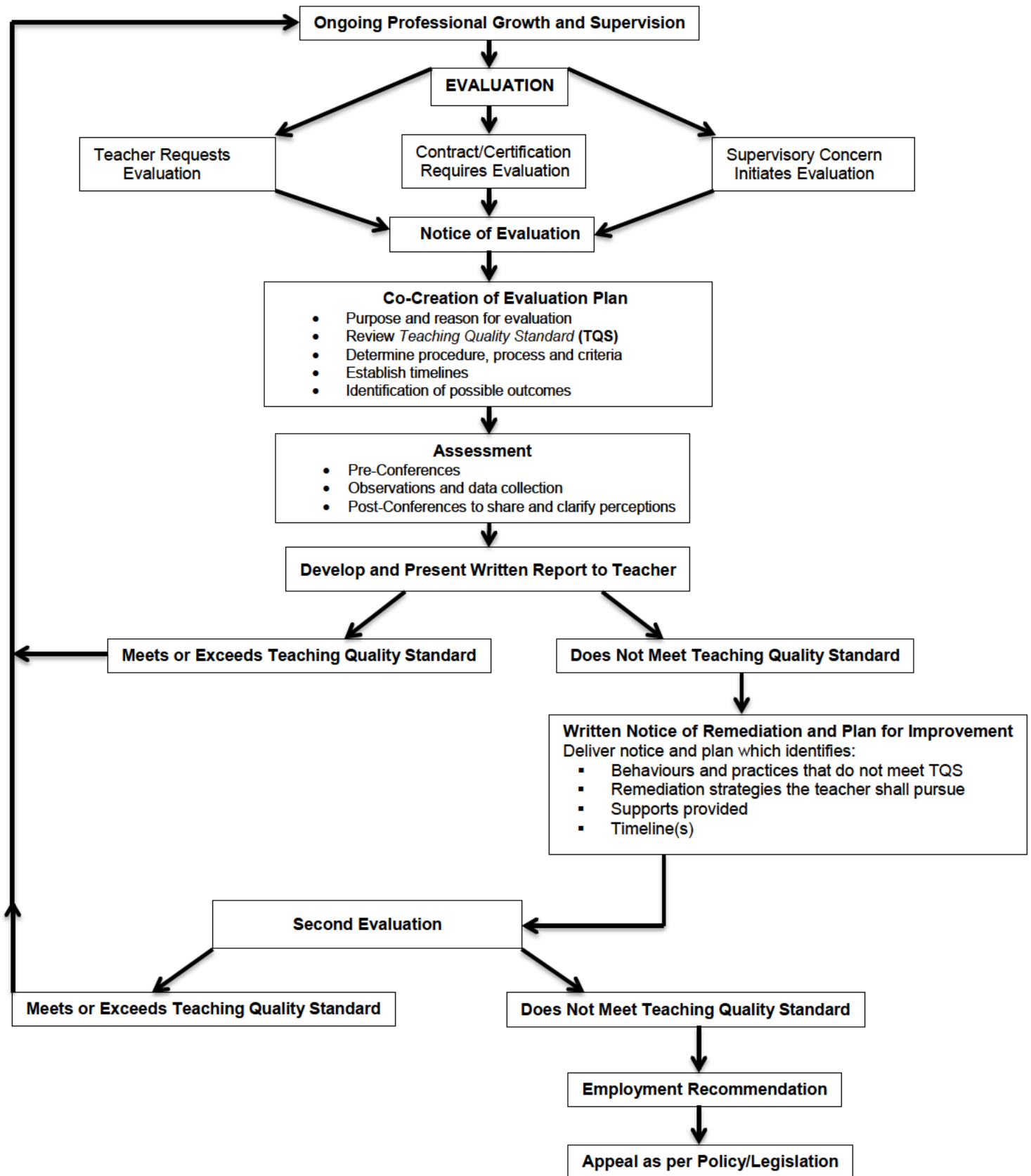**Ipsos Reid (n = 4307)**

| 7% | 24% | 38% | 31% |

Serious Concerns = 5 to 9　　**Significant Concerns = 10 to 13**　**Minimal Concerns* = 14 to 16**　**Relative Strengths** = 17 to 20**

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PF12: PSYCHOLOGICAL PROTECTION

A work environment where employees' psychological safety is ensured.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF12: Psychological Protection. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

24%	24%	21%	31%

Your Organization (n = 29)

Ipsos Reid (n = 4307)

9%	24%	36%	32%

Serious Concerns = 5 to 9 **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16** **Relative Strengths** = 17 to 20**

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PF13: PROTECTION OF PHYSICAL SAFETY

A work environment where management takes appropriate action to protect the physical safety of employees.

EMPLOYEE RESPONSES: % BY AREA OF CONCERN OR RELATIVE STRENGTH

The following graph displays the percentage of employee responses falling into each of the four areas of concern or relative strength for PF13: Protection of Physical Safety. The corresponding results of the 2012 Ipsos Reid survey are presented immediately below for comparison.

Your Organization (n = 29)
14% | 21% | 65%

Ipsos Reid (n = 4307)
4% | 15% | 40% | 41%

Serious Concerns = 5 to 9   Significant Concerns = 10 to 13   Minimal Concerns* = 14 to 16   Relative Strengths** = 17 to 20

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APPENDIX E

Ongoing Professional Growth and Supervision

Ongoing Professional Growth and Supervision

EVALUATION

Teacher Requests Evaluation

Contract/Certification Requires Evaluation

Supervisory Concern Initiates Evaluation

Notice of Evaluation

Co-Creation of Evaluation Plan
- Purpose and reason for evaluation
- Review *Teaching Quality Standard* **(TQS)**
- Determine procedure, process and criteria
- Establish timelines
- Identification of possible outcomes

Assessment
- Pre-Conferences
- Observations and data collection
- Post-Conferences to share and clarify perceptions

Develop and Present Written Report to Teacher

Meets or Exceeds Teaching Quality Standard

Does Not Meet Teaching Quality Standard

Written Notice of Remediation and Plan for Improvement
Deliver notice and plan which identifies:
- Behaviours and practices that do not meet TQS
- Remediation strategies the teacher shall pursue
- Supports provided
- Timeline(s)

Second Evaluation

Meets or Exceeds Teaching Quality Standard

Does Not Meet Teaching Quality Standard

Employment Recommendation

Appeal as per Policy/Legislation

APPENDIX F

PERFORMANCE ASSESSMENT GUIDE

Role Expectation: Student Welfare	Superintendent Evaluation Evidence	Quality Indicators
• Ensures that each student is provided with a safe and caring environment that fosters and maintains respectful and responsible behaviours • Ensures the safety and welfare of students while participating in school programs or while being transported to or from school programs on transportation provided by the division. • Ensures the facilities adequately accommodate division students. • Acts as, or designates, the attendance officer for the division.	<u>Internal Report:</u> • Survey results	• Develops measurements and monitors progress relative to providing a safe and caring environment • Provides analysis of incident reports • Implements the requirements of Occupational Health and Safety legislation, including required staff professional development • Complies with legislative requirements to appoint Attendance Officer for the division.

Role Expectation: Educational Leadership	Superintendent Evaluation Evidence	Quality Indicators

• Provides leadership in all matters relating to education in the division.
 	
• Provides leadership in fostering conditions which promote the improvement of educational opportunities for all students
	Internal Report
	
	• AERR:
	   o Satisfaction survey information
	   o PAT results
	   o Diploma results
	   o Completion rates
	
	• Trends and Issues document
		• The Superintendent conducts an analysis of student success and ensures school Principals develop action plans to address concerns
		
		• The Superintendent identifies trends and issues related to student achievement to inform the Three-Year Planning process, including recommendations for innovative means to

• Ensures students in the division have the opportunity to meet the standards of education set by the Minister. • Implements education policies established by the Minister and the Board.	• Superintendent recommendations to Three-Year Planning process External Report • Feedback from Alberta Education re: AERR Direct Board Observation • Annual report	improve measurable student achievement • Parents and students are satisfied with levels of achievement • There is measurable improved student achievement over time • The Superintendent meets Alberta Education's expectations re: AERR format and process and content • The Superintendent meets all timelines with provision for appropriate Board input relative to the AERR • The Superintendent ensures the Division's academic results are published

Role Expectation: Fiscal Responsibility	Superintendent Evaluation Evidence	Quality Indicators
• Ensures the Secretary Treasurer operates the Division in a fiscally responsible manner, including adherence to recognized accounting procedures, and in accordance with the terms or conditions of any funding received by the Board under the School Act or any other applicable Act or regulation.	• External Report • Auditor's Report • Auditor's Management Letter • Internal Report • Superintendent confidential communications to the Board showing notification of litigation • Quarterly reports and monitoring reports	• Generally accepted accounting practices are being followed • Adequate general financial management processes exist and are being followed. • All collective agreements and contracts are being administered and interpreted so staff and contracted personnel are being paid appropriately and appropriate

• Directs the development of and monitors the budget for the division. • Reports to the Board in terms that are easily understood.		deductions are being made • School based funds are expended as per approved budgets • The Board is informed annually about incurred liabilities, account balances and reserves • The Board is informed immediately regarding pending litigation

Role Expectation: Personnel Management	Superintendent Evaluation Evidence	Quality Indicators
• Has overall authority and responsibility for all personnel-related issues, except the development of mandates for collective bargaining and those personnel matters precluded by Board policy, legislation or collective agreements. • Ensures the coordination and integration of human resources within the division. • Monitors and improves the performance of all staff.	Internal Report • Annual Superintendent Evaluation Report re: personnel-related actions (e.g., staff professional development and leadership development, orientation, discipline, evaluation, recognition and supervision) Direct Board Observation • Board observations	• Develops and effectively implements quality recruitment, orientation, staff development, disciplinary, evaluation and supervisor processes • Models commitment to personal and professional growth • Fosters high standards of instruction and professional improvement (Quality Teacher Standards) • Provides for training of administrators and the development of leadership capacity within the division • Follows Board personnel policies • Models high ethical standards of conduct

Role Expectation: Policy	Superintendent Evaluation Evidence	Quality Indicators
- Implements Board policy with integrity. - Provides leadership in the planning, implementation and evaluation of Board policies. - Develops and keeps current an Administrative Procedures Manual and informs the Board of any changes to this Manual.	Internal Report - Policies in manual and revisions this past year - Superintendent Evaluation Report, which provides evidence the quality indicators have been met Direct Board Observation - Direct observation of Board policy development process	- The Superintendent appropriately involved individuals and groups in the policy development process and administrative procedures review process - Taking leadership in bringing policies to Board for review - Policy is adhered to - ensures this is happening - Timeliness of policy revision - The Superintendent demonstrates a knowledge of and respect for the role of the Board in policy processes

Role Expectation: Superintendent/Board Relations	Superintendent Evaluation Evidence	Quality Indicators
- Establishes and maintains positive professional working relations with the Board. - Honours and facilitates the implementation of the Board's roles and responsibilities as defined in Board policy. - Provides the information which the Board requires	Internal Report - Action sheets Direct Board Observation - Board agendas - Board meetings - Committee meetings - Listing of issues and background information	- The Superintendent implements Board directions with integrity in a timely fashion - The Superintendent provides support to the Board re: lobby efforts on behalf of the division - Board agendas are prepared and made available to trustees in sufficient time to allow for appropriate trustee

to perform its role in a timely manner.	• Superintendent e-mails and phone calls	preparation for the meeting • The Superintendent keeps the Board informed about division operations • The Superintendent provides the Board with balanced, sufficient, concise information and clear recommendations in agendas • The Superintendent interacts with the Board in an open, honest, pro-active and professional manner • Ensures high quality management services are provided to the Board • The Superintendent provides the Board with correspondence directed to the Board or trustees

Role Expectation: Three-Year Education Planning and Reporting	Superintendent Evaluation Evidence	Quality Indicators
• Leads the Three-Year Education Planning process including the development of the Three-Year Education Plan, division goals, budget, facilities and transportation plans and implements plans as approved. • Involves the Board appropriately (Board	<u>Internal Report</u> • Budget process and timelines and approved expenditures • Facilities Master Plan (FMP) • Process and Timelines document approved by the Board • Satisfaction survey information re: safety	• The three-year planning process involves appropriate stakeholder input and results in high stakeholder satisfaction • Facility project budgets and construction schedules are followed or timely variance reports are provided to the Board • Transportation services are provided with due

approval of process and timelines, Board identification of priorities and key results, opportunity for Board input early in the process, final Board approval). • Reports regularly on results achieved.	Direct Board Observation <u>External Report</u> • AlbertaEducation Monitoring Report	consideration for efficiency, safety and length of ride • Maintenance services are provided to ensure effective and efficient operation of our facilities • Develops short and long-range plans to meet the needs of the division and provide for continuous improvement • "Key results" identified by the Board are achieved • The budget and three-year plan are developed according to a timeline which ensures the Board's ability to provide direction, revise priorities and is approved within Alberta Education deadlines

Role Expectation: Organizational Management	Superintendent Evaluation Evidence	Quality Indicators
• Demonstrates effective organizational skills resulting in division compliance with all legal, Ministerial and Board mandates and timelines. • Reports to the Minister with respect to matters identified in and required by the School Act.	<u>Internal Report</u> • Superintendent reports to the Board <u>External Report</u> • AlbertaEducation Monitoring Reports	• Ensures division compliance with all Alberta Education and Board mandates (timelines and quality) • Effectively manages time and resources • Ensures contracted services (e.g., fiscal, labour and legal) meet quality expectations of the Board

		• Use of technology is effective and efficient

Role Expectation: Communications and Community Relations	Superintendent Evaluation Evidence	Quality Indicators
• Takes appropriate actions to ensure positive external and internal communications are developed and maintained. • Ensures that parents and students have a high level of satisfaction with the services provided and the responsiveness of the Division. • Acts as, or designates, the head of the organization for the purposes of the Freedom of Information and Protection of Privacy (FOIPP) Act. • Keeps the Board informed through the provision of appropriate monitoring reports. • In consultation with the Chair, serves as spokesperson for the division for the media and public in order to keep the Board's messages consistent and accurate. • Makes accessible to electors the Three-Year Plan, Annual Education Results Report, Board Policy Handbook, Administrative	Internal Report • Satisfaction survey data • Direct Board Observation	• Facilitates effective home-school relations • Manages conflict effectively • Ensures information is disseminated to inform appropriate publics • Works cooperatively with the media to represent the Board's views/positions • Promotes positive public engagement in the division • Represents the division in a positive, professional manner

Procedures Manual, Minutes and other documents in accordance to FOIPP in a timely and courteous manner. • Develops and maintains positive and effective relations with provincial and regional government departments and agencies. • Ensures parents have a high level of satisfaction with the servces provided and the responsiveness of the division. • Participates actively in school-based activities in order to enhance and support the division's mission.		

Role Expectation: Leadership Practices	Superintendent Evaluation Evidence	Quality Indicators
• Practices leadership in a manner that is viewed positively and has the support of those with whom he works most directly in carrying out the directives of the Board and the Minister. • Develops and maintains positive and effective relations with provincial and regional government departments and agencies. • Works collaboratively with the corporate Board,	External Report • Report of interviews with all of the Principals • Report of interviews with Superintendent's "direct reports"	• Provides clear expectations and direction • Provides effective educational leadership • Establishes and maintains positive, professional working relationships with staff • Unites people toward common goals • Demonstrates a high commitment to the needs of students • Empowers others

staff, students, parents, school councils and community members in establishing a positive and innovative culture and sense of pride in the division		• Effectively solves problems • Exercises leadership consistent with the Board's stated vision and values

APPENDIX G

RAW DATA	2013-14	2014-15	**2015-16	2016-17	TOTAL
*LOA	1	0	1	3	5
Requested Transfer	4	4	1	3	12
Internal Promotion	1	4	10	4	19
External Promotion	0	2	3	0	5
Resigned	1	2	2	3	8
Retired	1	4	3	1	9
Transfer	1	3	1	0	5
Return to Teaching	0	0	2	0	2

** ated in Palliser
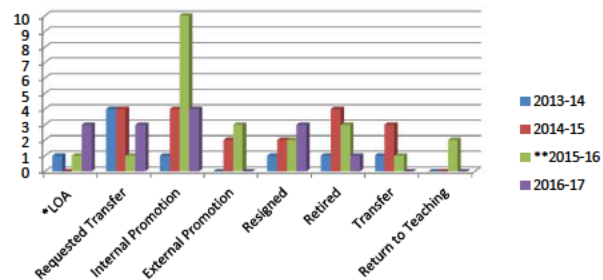
PERCENTAGE OF ADMIN MOVEMENT	2013-14	2014-15	2015-16	2016-17	Average
*LOA	2%	0%	2%	6%	3%
Requested Transfer	8%	9%	2%	6%	6%
Internal Promotion	2%	9%	22%	8%	10%
External Promotion	0%	4%	7%	0%	3%
Resigned	2%	4%	4%	6%	4%
Retired	2%	9%	7%	2%	5%
Transfer	2%	7%	2%	0%	3%
Return to Teaching	0%	0%	4%	0%	1%

AVERAGE ANNUAL PERCENTAGE OF ADMIN MOVEMENT
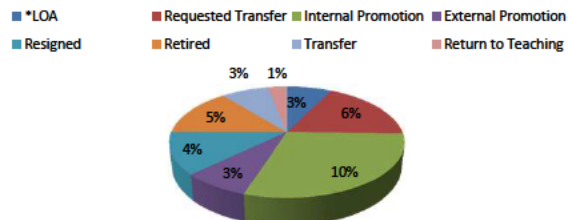
VOLUNTARY vs INVOLUNTARY

	2013-14	2014-15	2015-16	2016-17	TOTAL
Voluntary	8	16	20	14	58
Involuntary	1	3	3	0	7
TOTAL	9	19	23	14	65

Voluntary	16%	35%	43%	28%	31%
Involuntary	2%	7%	7%	0%	4%

AVERAGE ANNUAL VOLUNTARY vs INVOLUNTARY MOVEMENT
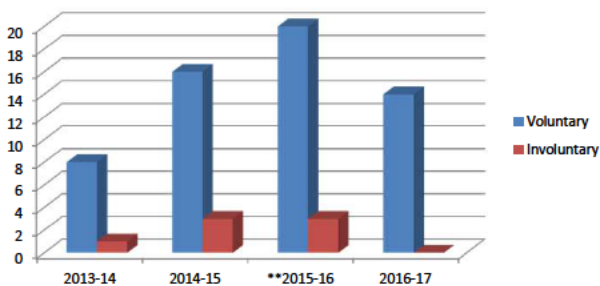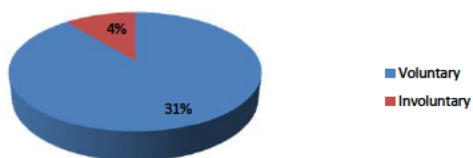
RETENTION RATE

	2013-14	2014-15	2015-16	2016-17	TOTAL LEFT	Average	Average as %
RETAINED	48	38	38	46		42.5	89%
TURNOVER	2	8	8	4	22	5.5	11%
TOTAL	50	46	46	50		48	

Average as %
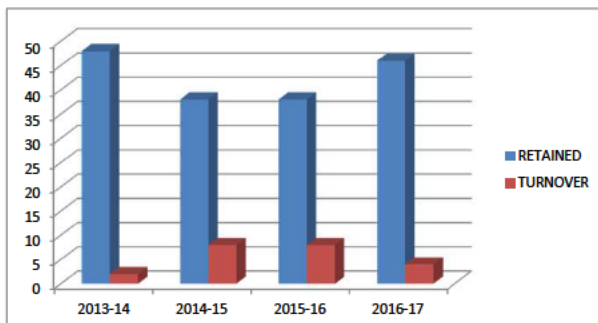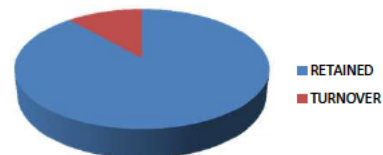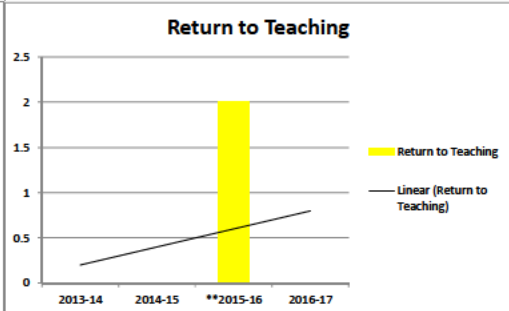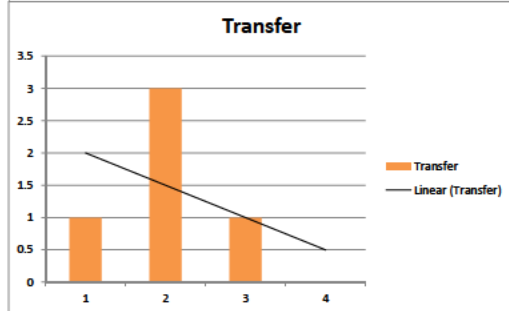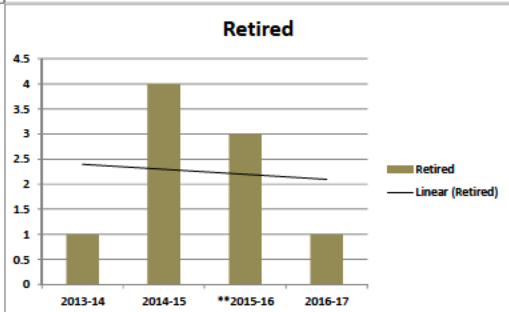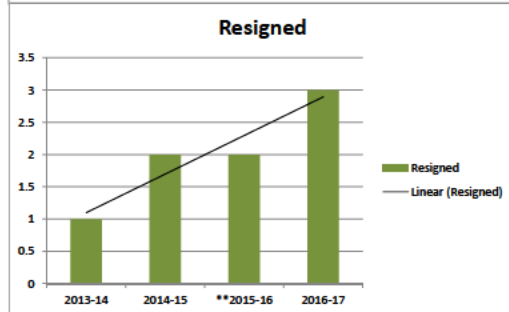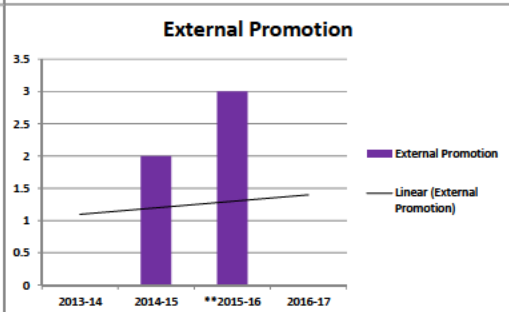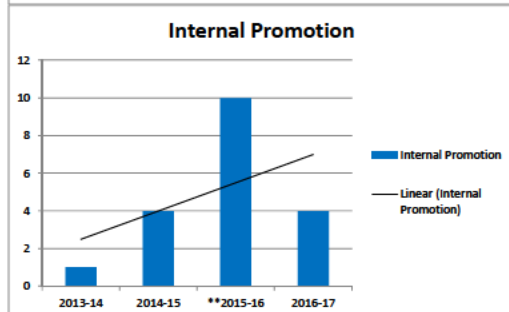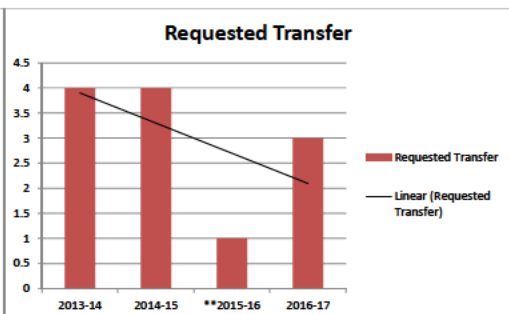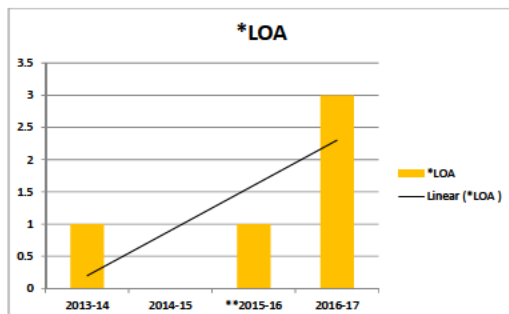
VOLUNTARY MOVEMENT

INVOLUNTARY MOVEMENT

PALLISER CERTIFICATED STAFF

2014 - 15 School Year				2015 - 16 School Year				
	Number	Percentage			Number	Percentage	Change from previous	
Total number of certificated staff	441			Total number of certificated staff	495			
Termination	0	0.00%		Termination	0	0.00%	0 00%	
Resignation	40	9.07%		Resignation	23	4.65%	-4.42%	
Retirement	8	1.81%		Retirement	8	1.62%	-0 20%	
Severence	4	0.91%		Severence	0	0.00%	-0 91%	
Contract End	4	0.91%		Contract End	6	1.21%	0 31%	
Total	48	**12.70%**		**Total**	31	**7.47%**	-5 22%	
14/15 Voluntary turnover:	40	10.88%		*15/16 Voluntary turnover:*	23	6.26%	-4 62%	
14/15 Involuntary turnover:	8	1.81%		*15/16 Involuntary turnover:*	6	1.21%	-0 60%	
14/15 Total turnover:	48	12.70%		*15/16 Total turnover:*	31	7.47%	-5 22%	
14/15 Retention rate:		**87.30%**		*15/16 Retention rate:*		**92.53%**	5 22%	

PALLISER SUPPORT STAFF

2014 - 15 School Year				2015 - 16 School Year			
	Number	Percentage			Number	Percentage	Change from previous
Total number of support staff	455			Total number of support staff	507		
Dismissal	12	2.64%		Dismissal	4	0.79%	-1 85%
Resignation	53	11.65%		Resignation	33	6.51%	-5.14%
Retirement	10	2.20%		Retirement	8	1.58%	-0 62%
Surplus	11	2.42%		Surplus	12	2.37%	-0 05%
Total	75	**18.90%**		**Total**	57	**11.24%**	-7 66%
14/15 Voluntary turnover:	53	11.65%		*15/16 Voluntary turnover:*	33	6.51%	-5.14%
14/15 Involuntary turnover:	23	5.05%		*15/16 Involuntary turnover:*	16	3.16%	-1 90%
14/15 Total turnover:	75	18.90%		*15/16 Total turnover:*	57	11.24%	-7 66%
14/15 Retention rate:		81.10%		*15/16 Retention rate:*		88.76%	7 66%
2014 - 15 Notes				**2015 - 16 Notes**			
A new tracking system was created in 2014 - 15 and evolved over the course of the school year	2014 - 15 stats were compiled until early July of 2015			2 new schools were added in 2015 -16	2015- 16 stats are from July 2015 until August 2016	Moving forward stats will be collected from August to August each year	The surplus list will change as we will be able to find positions for some EA's who were surplussed. Last year we started with 21 on the surplus list and ended with 11.

APPENDIX H

Palliser Regional Schools
Teacher transfer satisfaction data analysis (2011-2016)

School Year	Survey Responses	Teacher Initiated	Board Initiated	Other	Average Satisfaction Score (/5)	Average Satisfaction Score (/10)
2011-2012	6	3	2	1*	4.5	N/A
2012-2013	3	3	0	0	5.0	N/A
2013-2014	9	4	3	2#	4.7	N/A
2014-2015	17	9	5	3+	N/A	8.81
2015-2016	8	7	0	1*	N/A	6.88
Total	43	26	10	7	4.7	7.85

* No answer included in survey response
\# Transfer resulting from successful job completion
+ Glenmore Christian Academy leaving Palliser Regional Schools

1. How could Palliser Regional Schools improve the process of teacher transfers?

2011-2012	Redaction - Section 17(1) of the *FOIP Act* - No comments. - As long as you are listening to the needs of the teachers and administrators and are balancing those out, then I am satisfied with that. - I believe that transfers work really well when discussions are held with staff members and some choices are provided. I do realize that there is not always more than one choice available. I appreciate how Palliser Employers listen to the desires of staff when transfers are requested. - I would have liked to have been made aware that my requested transfer was still being considered. It would have been nice to have been kept informed that my request was still in the process of being granted. Redaction - Section 17(1) of the *FOIP Act*

2012-2013	- No suggestions. - No ideas as this transfer worked great for me! - I was very pleased with an opportunity to grow as a professional in a larger, more diverse school. I believe it is important to allow transferred individuals a chance to evaluate the move initiated by themselves or others. Thank you.
2013-2014	- Presently I feel that HR makes the appropriate decisions and thoughtfully takes all considerations into making their decisions. - The process allows teachers to express interest in transfers. It might be nice, if possible, to let teachers know if they will not be receiving a requested - None. - Overall, I was pretty happy with how the whole process was carried out - from my requested meeting, which was personal and not over the phone, to the connections I was able to make with both schools prior to the move. Everything was very comforting and welcoming and throughout it all I felt comfortable enough to approach anyone with questions. Thanks! - I am not sure, I like to move and my moves have been positive ones. - I have no reason to question the teacher transfer process. As a teacher, I have not been transferred. As an administrator, I have always been supported when there have been staffing concerns. - The process was fairly good, although I didn't receive paperwork for some time, as far as I remember. Kevin Garinger and I communicated via email but I was looking for "official" paperwork for a while. Also, I was never contacted by my new Principal. I believe I made the first contact with my new Principal, which I thought was a bit unusual. - I was very happy with the process in my case so I have no recommendations. - I was satisfied with my personal process of transfer, so I have no complaints or ideas for improvement.
2014-2015	- Speed up the process - too many transfers happen late in the school year. - I don't have any feedback here; my transfer "offer" felt open and invitational. I guess my feedback would be to do whatever it takes to keep it invitational, as opposed to mandated. ? - Mine was handled perfectly. - Not sure. Dealing with transfers is "delicate" because teachers are passionate about what they do. I think the way Ken Garinger personally came to visit and talk with me about my transfer was probably the best way that Palliser can handle teacher transfers. Redaction - Section 17(1) of the *FOIP Act*

- I appreciated the level of communication and flexibility I received from Ken Garinger and Stan Hielema. They did more than I expected. Thank you.

- None
- None
- I found the transfer quite easy to do. I am quite satisfied.

- The process is very straight forward. I see no issues with it.
- The process is very straight forward. I see no issues with it.

	Redaction - Section 17(1) of the *FOIP Act* Redaction - Section 17(1) of the *FOIP Act* - Process is excellent! No changes needed. - None
2015-2016	Redaction - Section 17(1) of the *FOIP Act* - The only issue was the timeline that the transfer was completed on. Understanding the nature of the HR scene within Palliser I understand why everything was a little late. For the rest the process was fantastic. - I have been very happy with the process. - Transfers should be a positive experience where HR and the teacher discuss and work together to come up with the "best fit" for the teacher. Happy teachers = Happy Students = Happy Schools It would be nice if HR would have a conversation with teachers about their options especially if they are being transferred to a position that they do not want. For example, in my case I would have appreciated Mr. Garinger having a discussion with me saying that a position in the school I wanted to transfer to was not available so I had a choice - stay where I was or go to a colony school. I would have chosen to stay where I was and wait for another opportunity to transfer to the school I would like to be in. - I do not feel that there is anything Palliser could do better. I am happy with my transfer and I feel that human resources worked well with me to help me achieve my goals as a teacher. - Make it quicker if at all possible. Forms filled out in Feb and then don't find out until mid June. - Everything went smoothly with my transfer. - None

2. General Comments

2011-2012	- Many transfers are not easy…as you well know! One common complaint I

	have always heard is the time factor. Often teachers (especially new ones without a contract) don't find out in time to apply for other jobs. I know there are people who take their transfers to the ATA etc. and this can slow the entire process down. Another problem is retiring teachers who wait until the last moment before they give their notice. Could a small buyout, if notice is provided before a given time, make the process quicker for teachers who want to retire or leave the school division? I am uncertain how this all works but an experienced teacher's wage and buyout combined could be less than the cost of a new teacher. It also opens up the opportunity for teachers "on the fence" to make the leap. Again, I am uncertain of the cost of this method. Who would not give early notice under these circumstances? - Change can be very hard, especially when you personally are not thinking about a new adventure and are happy where you are presently teaching. However, I do see the value in change and what new insights and opportunities it brings. I have to say that this was a good move for me and I am happy to take on my new challenges. - Thanks for checking back with me from time to time and for giving me a great mentor. - I realize that staffing is challenging and really appreciate the job that you all do to accommodate staff while keeping in mind the best interest of the students. - No comments. Redaction - Section 17(1) of the *FOIP Act*
2012-2013	- I understand that transfers take time and patience from both the Teacher and Palliser. Transfers can be made only when an opening or opportunity occur. I am grateful for being able to have the right in Palliser to voice my wishes to move into a new teaching position Redaction - Section 17(1) of the *FOIP Act* feel change is always a great chance to rejuvenate your career. I feel very refreshed. Redaction - Section 17(1) of the *FOIP Act* - None.
2013-2014	- Thank you for the opportunity to grow as a professional and enhance my repertoire of skills.

	  - None. - None. - I have really enjoyed the change and challenges that have come from my new position. The professional growth has been excellent. - No comments or concerns.
2014-2015	- None - None - Thank-you for having this survey. When I saw your email, I was delighted

	because it indicated you haven't 'forgotten' that I transferred schools for this school year. Your email means a lot.
	How to improve? Keep providing the 'personal touch' for which Palliser Regional Schools is known.
	Suggestions:
	1. contact teacher (in June) when actual process of transferring occurring (packing up one's classroom, moving to new school) to offer encouragement
	2. contact teacher in September once they have moved their resources and are setup in new classroom / space to offer encouragement
	3. contact teacher in October (around Thanksgiving) once first 6 weeks are completed to ask for feedback on how is it going
	4. whenever PSD Admin team in teacher's new building (example, if they are coming to meet with principal / VP to discuss school goals), physically pop in to teacher's new classroom and say 'hello' and see how it is going.
	- I rated my transfer a 7 because I was moved to a school not in my list of three choices and not at a grade level I had experience in. I accepted this transfer as it was indicated that it would be a temporary placement until an opening at the school that we moved my children to would open up. I recognize that last year there were many more transfers than usual (at least for the Calgary schools). I appreciate that not everyone was able to get their dream transfer in the first round:)
	- None
	- None
	- None
	- This position has enhanced my teaching repertoire. Thank you.
	- These are just some thoughts I've had:
	I know resignations and retirements have to be in by the end of May, could transfers take place after that?
	Obviously HR knows when a school needs a teacher transferred in. Could they communicate with the Principal to get an idea of who is leaving and what the new position might look like?
	If offered a transfer, can a teacher decline and remain at their current position until something more agreeable became available?
	Why can't transfers take place in June?
	I hope this can somehow help improve the process.
	- I have been so impressed with how masterfully our Admin team is able to transfer and meet the wishes of its teachers. I have appreciated the way Palliser has been able to support my professional goals - Thank you!
	- None
2015-2016	- None

	- The process was a grace filled process that I felt respected my personal needs and those of both schools involved. I appreciate the insight from Ken throughout the process. - I am enjoying my new placement and love being back in grade one again! - Forced transfers into positions teachers do not want, are not trained for, or have no experience in cause a great deal of emotional distress. It is disheartening, disappointing, stressful, and maddening (just to name a few). Teacher well being and job satisfaction should count for something. HR and Principals need to work together so that when teachers are transferred, they are transferred into positions that they want. Ex. If someone wants to work with Grades 3 - 6, they should not be forced to be LST/Grade 1 teachers. - None - As happy as I was to be transfered, it was to a position and level I have never taught. I believe I could be a much more valuable employee in my area of experience. - Appreciate the ability to share preferences in schools and assignment. - None

APPENDIX I

SUPPORT STAFF DATA 2015-16 SCHOOL YEAR

ABSENCES	CALGARY (in Hours)	CALGARY (in Days)	TOTAL STAFF WHO TOOK SICK DAYS SUPPORT	PERCENTAGE OF STAFF (CAL)	DAYS USED PER STAFF MEMBER WHO TOOK SICK DAYS (CALGARY)	TOTAL STAFF WHO DID NOT USE SICK DAYS (CALGARY)	PERCENTAGE OF STAFF WHO DID NOT USE SICK DAYS (CALGARY)	DAYS USED PER TOTAL STAFF (CALGARY)
3 Days Sick of Less	2392	342	72	65.5%	4.7			
More than 3 Days Sick	1390	199	11	10.0%	18.1			
Totals	3782	540	83	75.5%	6.5	27	25%	4.9

ABSENCES	REST OF PALLISER (in Hours)	REST OF PALLISER (in Days)	TOTAL STAFF WHO TOOK SICK DAYS (REST OF PALLISER)	PERCENTAGE OF STAFF (REST)	DAYS USED PER STAFF MEMBER WHO TOOK SICK DAYS (REST OF PALLISER)	TOTAL STAFF WHO DID NOT USE SICK DAYS (REST OF PALLISER)	PERCENTAGE OF STAFF WHO DID NOT USE SICK DAYS (REST OF PALLISER)	DAYS USED PER TOTAL STAFF (REST OF PALLISER)
3 Days Sick of Less	3646	521	216	54.4%	2.4			
More than 3 Days Sick	6274	896	54	13.6%	16.6			
Totals	9920	1417	270	68.0%	5.2	127	32%	3.6

ABSENCES	PALLISER TOTAL HOURS	PALLISER TOTAL (in Days)	TOTAL SUPPORT STAFF WHO TOOK SICK DAYS (PALLISER)	PERCENTAGE OF TOTAL STAFF (PALLISER)	DAYS USED PER STAFF MEMBER WHO TOOK SICK DAYS (PALLISER)	TOTAL STAFF WHO DID NOT USE SICK DAYS (PALLISER)	PERCENTAGE OF STAFF WHO DID NOT USE SICK DAYS (PALLISER)	DAYS USED PER TOTAL STAFF (PALLISER)
3 Days Sick of Less	6038.428	863	288	56.8%	3.0			
More than 3 Days Sick	7664.007	1095	65	12.8%	16.8			
Totals	13702	1957	353	69.6%	5.5	154.0	30%	3.9

APPENDIX J

health profile

This Health Profile contains important information about the health of your employees and their dependants. Specifically, it examines the risks for and prevalence of diabetes, high cholesterol, depression and high blood pressure in your school jurisdiction. Most importantly, the profile also includes useful information about how your school jurisdiction can take action to prevent these chronic disease factors and improve the health and quality of life for your employees.

This profile was prepared by ASEBP, using information about your school jurisdiction's drug utilization plan compared to the ASEBP average, and is supplemented by regional, provincial and/or national data (as available).

This report uses claims data from
January 1, 2015 to December 31, 2015

We hope you find this document useful in informing your health journey. If you have any questions about this information, don't hesitate to contact the ASEBP Health Team.

Yours in health,

ASEBP HEALTH TEAM

MULTIPLE FACTOR PREVALENCE

Multiple factor prevalence (shown below as a percentage of covered members in the group) represents those with two or more of the following conditions: high blood pressure, pre-diabetes or diabetes, and elevated cholesterol. Individuals with two or more of these risk factors, in combination with a high waist circumference, are at significant risk for developing chronic disease.

Two or more risk factors: 5.9%

OVERWEIGHT AND OBESITY PREVALENCE

A high waist circumference is an indication of being overweight or obese. As noted above, it is also a risk factor for developing chronic disease. For your reference, the Alberta provincial averages for both risk conditions as reported by the Health Quality Council of Alberta are below.

Provincial obesity rate: 23.9%
Provincial overweight: 35.2%

diabetes

Diabetes is a chronic disease where the body cannot produce insulin or cannot use insulin properly. Type 2 diabetes is the most common form of diabetes and is preventable. Incidents of Type 2 diabetes have been increasing in epidemic proportions around the world even though many things can be done by individuals to prevent its onset.

Risk factors for type 2 diabetes:
- Family history of Type 2 diabetes
- Diagnosed with pre-diabetes
- High blood pressure and/or cholesterol
- Overweight / high waist circumference

Prevention and management:
- Regular physical activity
- Healthy eating
- Weight management
- Additionally, if you have diabetes it is important to:
    - Keep blood sugar levels within recommended ranges in order to prevent complications.
    - Take medications as directed.
    - Utilize your health care team and community resources for support.

SCHOOL JURISTICTION INFORMATION

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Percentage of plan cost:
- In your school jurisdiction: 6.6%
- For ASEBP: 8.3%

Population prevalence:
- Ratio: 1 in 24
- 47.6% are employees

Those with diabetes:
- Cost the plan 3.6 x more than those without
- Submit 4.6 x more claims than those without

Of those employed (and their dependants) 4.8% are under the age of 25 and currently diagnosed with this condition.

NON-ADHERENCE*

42.2%

* Adherence refers to prescribed medication therapy. Non-Adherence is based upon drug claim patterns specific to each condition.

Depression is a medical condition that occurs when an individual has feelings of severe despair for an extended time period. Typically, most aspects of a person's life become affected by these feelings. Major depressive disorder is the most common type of depression. It occurs when a person has feelings of sadness or hopelessness that last for at least two weeks, usually on a daily basis, for most of the day.

Risk factors for depression:
- Family history of depression
- Difficult life events such as childhood trauma, chronic illness, low income or increased work demands
- Substance use
- Imbalanced chemicals in the brain

Prevention and management:
- Appropriate medical treatment
- and support
- Regular physical activity
- Healthy eating
- Good sleep habits
- Limit alcohol consumption

SCHOOL JURISTICTION INFORMATION

Percentage of plan cost:
- In your school jurisdiction: 6.8%
- For ASEBP: 6.8%

Population prevalence:
- Ratio: 1 in 8
- 61.2% are employees

Those with depression:
- Cost the plan 2.3 x more than those without
- Submit 2.9 x more claims than those without

Of those employed (and their dependants) 17.9% are under the age of 25 and currently diagnosed with this condition.

NON-ADHERENCE*

37.1%

* Adherence refers to prescribed medication therapy. Non-Adherence is based upon drug claim patterns specific to each condition.

high blood pressure

High blood pressure (hypertension) occurs when there is too much pressure in the blood vessels. This excess pressure can cause damage to the blood vessels and heart problems. The risk for stroke and heart disease is greatly increased with high blood pressure.

Risk factors for high blood pressure:
- Age (the older you are, the greater your risk)
- Family history of high blood pressure
- Overweight/high waist circumference
- High sodium diet
- Smoking
- Excessive alcohol consumption

Prevention and management:
- Regular physical activity
- Healthy eating (including reduced sodium intake)
- Weight management
- Stress management
- Tobacco cessation
- Limit alcohol consumption
- Additionally, if you have high blood pressure:
  - Take medications as directed.
  - Learn how to monitor your own blood pressure.
  - Use your health care team and community resources for support.

elevated cholesterol

Cholesterol is a type of fat in the blood that our body needs for optimal functioning. However, when certain cholesterol levels get too high, it can become a significant risk factor for heart disease and stroke. Having high cholesterol levels can lead to a buildup of hardened fat (plaque) on artery walls.

Risk factors for elevated cholesterol:

- Males over age 40
- Females over age 50
- High blood pressure and/or diabetes
- Overweight/high waist circumference
- Family history of elevated cholesterol

Prevention and management:

- Healthy eating (including reducing saturated fat intake)
- Regular physical activity
- Tobacco cessation
- Maintain a healthy weight
- Additionally, if you have high cholesterol:
  - Take medications as directed.
  - Use your health care team and community resources for support.

SOURCES

Canadian Diabetes Association - www.diabetes.ca
Canadian Mental Health Association - www.cmha.ca
Depression Hurts.ca - www.depressionhurts.ca
Health Quality Council of Alberta - www.hqca.ca
Hypertension Canada - www.hypertension.ca
Heart and Stroke Foundation -
www.heartandstroke.com
Public Health Agency of Canada -
www.publichealth.gc.ca

For more information please call,
email or visit ASEBP!

Monday to Friday between 8:00 a.m. & 4:30 p.m.
Phone: 780-431-4775 in the Edmonton area • Toll-
free: 1-877-431-4777
Email: clinics@asebp.ab.ca • Website:
www.asebp.ab.ca

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APPENDIX K

Accountability Pillar Overall Summary
Annual Education Results Reports - Oct 2016
Authority: 2255 Palliser Regional Division No. 26

Alberta Government

Measure Category	Measure Category Evaluation	Measure	Palliser Regional Div No. 26			Alberta			Measure Evaluation		
			Current Result	Prev Year Result	Prev 3 Year Average	Current Result	Prev Year Result	Prev 3 Year Average	Achievement	Improvement	Overall
Safe and Caring Schools	Acceptable	Safe and Caring	91.2	92.1	92.6	89.5	89.2	89.1	Very High	Declined Significantly	Acceptable
Student Learning Opportunities	Acceptable	Program of Studies	79.8	82.0	82.7	81.9	81.3	81.4	High	Declined Significantly	Issue
		Education Quality	90.5	92.5	92.9	90.1	89.5	89.5	Very High	Declined Significantly	Acceptable
		Drop Out Rate	3.1	2.6	2.5	3.2	3.5	3.5	High	Declined	Acceptable
		High School Completion Rate (3 yr)	84.8	84.0	84.1	76.5	76.5	75.5	Very High	Maintained	Excellent
Student Learning Achievement (Grades K-9)	Excellent	PAT: Acceptable	82.5	80.9	82.8	73.6	72.9	73.4	High	Maintained	Good
		PAT: Excellence	29.0	28.9	27.8	19.4	18.8	18.6	Very High	Maintained	Excellent
Student Learning Achievement (Grades 10-12)	n/a	Diploma: Acceptable	88.0	89.0	89.5	85.0	85.2	85.1	High	Maintained	Good
		Diploma: Excellence	21.4	18.9	19.4	21.0	21.0	20.5	High	Maintained	Good
		Diploma Exam Participation Rate (4+ Exams)	58.1	60.3	60.5	54.6	54.4	53.5	High	Maintained	Good
		Rutherford Scholarship Eligibility Rate	76.1	n/a	n/a	60.8	n/a	n/a	n/a	n/a	n/a
Preparation for Lifelong Learning, World of Work, Citizenship	Good	Transition Rate (6 yr)	64.2	67.3	67.2	59.4	59.7	59.3	High	Maintained	Good
		Work Preparation	88.9	88.3	88.9	82.6	82.0	81.1	Very High	Maintained	Excellent
		Citizenship	87.1	88.6	88.3	83.9	83.5	83.4	Very High	Declined	Good
Parental Involvement	Good	Parental Involvement	85.1	87.5	87.4	80.9	80.7	80.5	Very High	Declined	Good
Continuous Improvement	Acceptable	School Improvement	80.8	84.5	85.2	81.2	79.6	80.0	Very High	Declined Significantly	Acceptable

Notes:
1. Results have been adjusted to reflect the change from previous data source systems to Provincial Approach to Student Information (PASI).
2. Due to the change from previous data source systems to Provincial Approach to Student Information (PASI), historical Rutherford Scholarship Eligibility Rate results are not available.
3. Aggregated PAT results are based upon a weighted average of percent meeting standards (Acceptable, Excellence). The weights are the number of students enrolled in each course. Courses included: English Language Arts (Grades 6, 9, 9 KAE), Français (Grades 6, 9), French Language Arts (Grades 6, 9), Mathematics (6, 9 KAE), Science (Grades 6, 9, 9 KAE), Social Studies (Grades 6, 9, 9 KAE).
4. Aggregated Diploma results are a weighted average of percent meeting standards (Acceptable, Excellence) on Diploma Examinations. The weights are the number of students writing the Diploma Examination for each course. Courses included: English Language Arts 30-1, English Language Arts 30-2, French Language Arts 30-1, Français 30-1, Chemistry 30, Physics 30, Biology 30, Science 30, Social Studies 30-1, Social Studies 30-2.
5. Overall evaluations can only be calculated if both improvement and achievement evaluations are available.
6. Results for the ACOL measures are available in the detailed report: see "ACOL Measures" in the Table of Contents.
7. Participation in Provincial Achievement Tests was impacted by the flooding in June 2013 (Grade 9 only) and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
8. Participation in Diploma Examinations was impacted by the flooding in June 2013 and by the fires in May to June 2016. Caution should be used when interpreting trends over time for the province and those school authorities affected by these events.
9. Survey results for the province and school authorities were impacted by the changes in the number of students responding to the survey through the introduction of the OurSCHOOL/TTFM (Tell Them From Me) survey in 2014.
10. Data values have been suppressed where the number of respondents/students is fewer than 6. Suppression is marked with an asterisk (*).