# CULTURE and WELLNESS in the WORKPLACE

developing your own
culture and wellness plan

2017

Canada

BRITISH
COLUMBIA

## About the ANP Strategy

The Aboriginal Non-profit Workforce and Human Resource Strategy was born out of a spirit of collaboration across this sector. The strategy aims to support, sustain and uplift the ANP workforce so that the sector can continue to assist, heal and strengthen Aboriginal peoples and communities now and into the future. The sector includes agencies and organizations that deliver services in the areas of health, employment, child and family services, treatment and housing.

## About the Logo

*This print represents the perseverance and sustenance involved when we work for our communities. The salmon represent perseverance and are about respect for tradition, intuition, inner voice, determination and ability to follow your vision. The hummingbird represents sustenance and the greater nectar of Life, great beauty, love and harmony, the tireless song of joy.* (Artist Jamin Zuroski, Namgis First Nation)

# Acknowledgements

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## SECTION A: Setting the Stage

### Introduction

Aboriginal organizations provide opportunities to enrich the traditional and cultural support networks that were historically supplied by our families and community. When Indigenous people live away from their home communities, they often utilize Aboriginal Non-Profit (ANP) organizations to access a safe places and resources to connect with their culture and teachings.

When culturally mindful and self-aware employees deliver programs, organizations can continue to offer services to our communities that support, heal, and strengthen our people now and for generations to come. Healthy employees contribute to a healthy workplace, and a healthy workplace contributes to healthy employees.

Culture and wellness within our organizations are critical to the success of effective and responsive service delivery. When wellness is achieved within the workplace, organizations are better able to promote healing within the community and nurture creativity. Workplace wellness is about caring for one another and living and working with holistic practices that nurture the spiritual, mental, physical, and emotional aspects of a person, staff team, board, and an organization.

Workplace wellness contributes to a healthy work-life balance for the committed individuals who serve, work, and volunteer in Aboriginal Non-Profit (ANPs). The effects of wellness in the workplace flow into the employee's family, home, and community life and can contribute to the growing of healthy and authentic relationships in the community at large.

### About This Guide

This *Culture and Wellness in the Workplace Guidebook* is a guide and set of resources developed to help your employees, your teams, your volunteers, your board members, and your organization as a whole strengthen connections with culture and wellness.

Many of the resources within the guidebook are based on three rules cited by Margaret Wheatley in *The Promise and Paradox of Community* (Wheatley & Kellner-Rogers, 1998) and *Finding Our Way: Leadership for an Uncertain Time* (Wheatley, 2007). The rules are (a) take care of yourself, (b) take care of each other, and (c) take care of this place. These guidelines seem fitting for application within an ANP context, as they are firmly rooted in the ideas of interconnectedness and relationships.

This guidebook also includes various self-reflection tools, strategies, and sample policies to help your employees, teams, and organization develop culture and wellness plans. Below is a list of the resources and their purpose:

- **Each Section (Section C – *Take Care of* Yourself; Section D – *Take Care of Each* Other; and Section E – *Take Care of This* Place) contains the following tools:**

  - **Self-Reflection Wellness Wheels:** for exploration and understanding of the various aspects of personal, team, and organizational wellness.

  - **Self-Reflection Exercises:** help identify where your staff, teams, and organization are currently at and possible next steps for a path forward.

  - **Posters:** designed to be used as a self-reflection tool and serve as ongoing reminders of the importance of taking care of yourself, taking care of each other, and taking care of this place. Posters are presented on the page before each strategy exercise.

  - **Culture and Wellness Strategies:** to help your staff, your team, and your organization achieve the level of culture and wellness you desire.

- **McKinsey & Company Non-Profit Board Self-Assessment**: This resource helps non-profits assess their performance and identify their priorities for board activities going forward (Appendix A).

- **Self-Reflection Guide for Strengthening Connections with Culture and Traditional Values in the Aboriginal Non-profit Workplace**: This resource helps identify strengths and opportunities for the inclusion and promotion of culture and traditional values in the workplace (Appendix B).

- **Culture and Wellness Self-Reflection Tool:** This resource helps identify where you are with your own personal wellness and also touches on how you view your occupational wellness (Appendix C).

- **Culture and Wellness Terms of Reference:** This sample Terms of Reference for a Culture and Wellness Committee provides prompts and guidelines for consideration in the development of a committee for your organization (Appendix D).

- **Wellness Bingo Game:** with a caller's card and multiple player cards to bring attention to effective wellness strategies using a fun interactive game (Appendix E).

- **Sample Pet Policies:** to assist your organization in culture and wellness related policy development. Many businesses and organizations recognize pet-friendly workplaces can contribute to workplace wellness. Pets in the workplace can assist in reducing stress; increasing productivity and ensuring their owners take breaks (Appendix F).

- **Cultural Leave Policy:** to assist your organization in addressing cultural leave for staff. (Appendix G)

As part of this guide, you will find activities and tools designed to help you and your organization:

- ✓ **Reflect** on the degree to which wellness and cultural values and traditions are embedded in your workplace
- ✓ **Define** your vision and what success means to you in the areas of wellness and culture
- ✓ **Take steps** to further integrate wellness and culture into policies and practices.

Doing this work is important because when individuals are living their best life and working in a great environment, they are better able to contribute to their clients, organization, and community in a healthy and sustainable way.

It is important to remember not to stress out about where you are on your journey at the moment; this process is about identifying where you, your team, and organization are at, compared to where you want to be in the future. Resources and tools for creating a plan to achieve the future you desire are provided to help you get started. This process can help you identify and build on your strengths to continue growing towards being the healthiest workplace you can be.

## About the ANP Strategy

Hundreds of Aboriginal Non-Profit (ANP) agencies across British Columbia serve the Aboriginal community in the areas of housing, employment, drug and alcohol treatment, health, sports and recreation, arts and culture, and child and family services. ANPs pride themselves on providing rewarding, community-focused, and culturally relevant workplaces doing incredibly meaningful work for their people.

This *Culture and Wellness in the Workplace Guidebook* was developed as part of the BC Aboriginal Non-Profit Sector Workforce (anpBC) Strategy. Launched in 2010, the anpBC Strategy (anpBC, n.d.) is an Indigenous-led effort to develop resources for ANP organizations to address human resource (HR) challenges. The strategy's goal is to uplift and sustain the ANP workforce in a holistic, sustainable and impactful way.

Employees and volunteers of the ANP sector face a number of issues in the workplace that impact their ability to do their jobs well. Research and experience tells us that the long-term effects of residential school and colonization, modest wages and benefits, stressful work, and short-term funding cycles have lasting and negative impacts on the ANP workforce.

In order to embrace the rewards of working in an ANP, staff must be set up for success, with the knowledge and skills for overcoming challenges. The best way to do this within an Aboriginal context is

to promote balance in the workplace by lifting up the values of wellness and culture. By doing this, the anpBC Strategy and ANPs can help provide deeply fulfilling job experiences and support people in taking care of themselves, each other, and their organizations.

## Defining Culture and Wellness

*Culture* and *wellness* are ways of thinking about who we are, how we take care of ourselves, and how we contribute to community. Although they represent different things to different people, they are sometimes woven together, and when intentionally nurtured, they allow us to live as strong, resilient, and happy communities.

### *Wellness*

Wellness relates to our state of health and our vision towards becoming our healthiest self. Wellness is the foundation of everything we do in life; being well helps us succeed in our professional and personal lives. Sometimes, it is easy to forget this, unless we are part of a supportive community that promotes healthy living. Since employees spend approximately 60% of their waking hours at work, a supportive community in the workplace is an invaluable gift.

Although there are many common ideas of what it means to be healthy, there is no right or wrong approach to wellness. It is up to every individual to define what our bodies, minds, and spirits need in order to feel our best. In organizations, individuals work together to find out what strategies will support collective wellness.

It is also important to recognize that wellness is holistic; it goes beyond just our physical health. Holistic understandings of health recognize the importance of the whole person, including physical, mental, spiritual, and emotional wellness, to be fully healthy. Healing is the process of improving our wellness, and it is the work we do for ourselves and those we care about so that our communities can be healthy, safe and supportive. Healing does not have a beginning and an end; it is intergenerational work, and it is ongoing.

For Aboriginal peoples, there are specific components of holistic health, such as culture, that are important to workplace wellness.

**Healthy employees contribute to a healthy workplace and a healthy workplace contributes to healthy employees.**

## *Culture*

Culture is the dynamic and multidimensional expression of identities, worldviews, and ways of being. For Indigenous peoples, culture is inherently place based – emanating from and connecting to the land, water, and environment. It is connected to sacred ceremonies, medicines, traditional foods, and language. BC is one of the most language-rich places in the world, with 34 Indigenous languages in the province. We are also rich with traditional food resources, such as moose meat, ooligan, elk, and salmon to name just a few.

Traditionally, cultures would inform the type of work that individuals did in their communities. Today, for many, culture still strongly influences one's role and identity within community as well as one's professional dreams. Because of this, when culture is welcomed into the workplace, it can lead to committed, long-term, happy, healthy, and connected volunteers, board members, and employees. People tend to thrive in environments where they identify as being part of a larger community, have a sense of responsibility and vested interest, and feel valued for their contributions.

Inclusion of culture in the workplace helps to create a safe space for Indigenous staff and clients. It creates opportunities for cross-cultural sharing, and as a result, the workplace can be a positive space for learning about and celebrating one's own culture.

By building emotional competency, self-esteem, and good communication skills, culture is also a medicine that helps us to heal from intergenerational traumas. Because culture is informed by the continuity of traditional practices, Elder leadership is perhaps the most important part of Indigenous cultures. Elders are phenomenal teachers, providing leadership that catalyzes positive growth in communities and organizations.

The culture and teachings from the territory in which your organization resides, as well as the cultures that your employees carry with them, often define the cultural expression in your workplace. There are many ways in which culture is expressed in the ANP workplace, including but not limited to:

- Traditional ceremonies and practices, such as smudging;
- Talking circles, drumming, and singing;

- ✤ Practicing Indigenous protocols, such as acknowledging territory and incorporating the local language;

- ✤ Incorporating Indigenous values, such as equilateral leadership and creating an Elder-in-residence position; and

- ✤ Visual cultural displays, such as art, carvings, and regalia.

Bringing culture into the workplace is a form of "Indigenization" or decolonization that helps both Indigenous and non-Indigenous peoples to resist the ongoing legacies of colonization. Although some non-Indigenous peoples may not be as rooted in their traditions as other, learning about culture can get everyone excited to celebrate where they come from and be respectful guests on Indigenous lands. This is a great tool for relationship building that contributes to the goals of Truth and Reconciliation (Truth and Reconciliation Commission of Canada, n.d.).

In this way, a connection to culture and traditional value systems can also help navigate conflict and lateral violence, respectfully, in the workplace.

*BC has a very rich and diverse Indigenous population. There are a full range of languages, teachings and ceremonies. It is important to honor your own teachings and those of the people of the territory you are working within.*

## About the Tools for Change

The role of this guide is to offer you a map for navigating your journey toward improved satisfaction with culture and wellness in your organization.

In the following section, you will find an inventory of the tools that can be used by your organization to reflect, define your vision, and take action. This guide weaves together existing tools (like the Cultural Self-Reflection tool) that were created in earlier phases of the anpBC Strategy with newly developed resources, such as policy development templates, games, and self-reflection tools. All of these resources were developed to respond to the needs identified by ANP organizations and are designed to support organizations in their journey toward improved wellness and culture for their staff, their teams, and their organizations as a whole.

The resources found in Sections C, D, and E include self-reflection wellness wheels, self-reflection exercises, posters, strategies for change, and an activity sheet.

**The self-reflection wellness wheels** are a helpful tool for understanding the various aspects of taking care of yourself, taking care of each other, and taking care of your organization. Descriptions of the various sections of the wheel are provided, and the reader can reflect on how they currently relate to the topics in each section. Once completed, the wellness wheel provides a snap shot of areas of strength as well as areas requiring attention.

**The self-reflection exercises** follow the wellness wheels. The exercises are intended to identify readiness for change as well as potential next steps to address areas requiring attention.

**The posters** are designed to enhance workplace wellness through visual cues associated with Indigenous culture, stories, and values. The posters speak to the three themes of *take care of yourself, take care of each other,* and *take care of this place,* and are presented before the strategy section for each theme's activities.

When posted in the office, these posters will be seen by each employee, volunteer, board member, or client, giving them the opportunity to reflect on the values being shared and how they connect to each individual's own journey. They can also lead to a deeper discussion at the organizational level about developing a wellness program or plan.

The posters serve as a reminder of why culture and wellness are so important and aim to empower people to connect with their culture and engage in preventative and healing wellness work.

**Culture and wellness strategies** follow the posters. The strategies provide simple, no cost / low cost activities that can assist in improving individual, team and organizational capacity.

**The Culture and wellness cards**, are a powerful reflection and visioning tool that can be used to get people talking or assessing where they are at and what they need on their journey. Both wellness and culture, have physical, mental, emotional, and spiritual components. The culture and wellness cards offer a way to connect to these components within ourselves through:

- Positive affirmations

- Simple activities

- Visual cues and symbolism

- Emotionally competent language

Card activities can be done individually or in a group setting. Cards can be pulled randomly at meetings to initiate a discussion on a particular topic and how it may impact the workplace. They serve as an interesting way to spark a conversation about wellness and culture in the workplace without all the reading and planning!

**The culture and wellness bingo game** supports wellness by creating a learning opportunity for community members to connect with one another in a fun and playful way. This game will share the teachings and values of wellness and culture in a group setting that is educational and engaging.

By building relationships through social activities, employees will feel an increased level of accountability to one another. This is key to supporting each other towards increased wellness and creating safe spaces where staff members feel inspired to share their culture. In addition to this, instead of numbers and letters, the bingo cards are made up of words and concepts that reflect the values of Indigenous culture and wellness to serve as reminders and motivation for bringing the organizational vision to life.

## What the Research Tells Us

Research tells us that creating healthy workplaces that value culture and employee wellness is a winning proposition for organizations (Baicker, Cutler & Song, 2010; Lowe, 2003; Parks & Steelman, 2008). As explained in the previous section, healthy workplaces lead to greater employee satisfaction and therefore greater worker retention, less absenteeism (e.g., sick days), and better service delivery. After all, it makes sense that healthy and grounded employees can more positively support the clients and communities they serve.

Lifting up wellness and culture in the workplace requires a high level of commitment from employees, employers, board members, and other forms of leadership. Achieving this relies on understanding wise practices and learning from other communities. Considerable research has been done showing how organizations can empower employees by prioritizing wellness and the inclusion of Indigenous culture. The strategies and ideas shared in this guide are based on this body of wise practices, which is informed by the experience of the ANP sector, the teachings of Elders, public sector initiatives, and academic research.

## Aboriginal Non-Profit Sector Research

Indigenous communities contain within them vast amounts of inherited knowledge in the areas of culture and wellness. While there is always room for improvement in workplace wellness through changes in organizational policies and practices, it is important to remember that a solid history of

traditional knowledge exists to draw upon. This history can provide a foundation for wellness and culture planning.

This guidebook draws on research carried out in Phase One of the anpBC Strategy that explored workplace wellness in Indigenous contexts.  In 2012, anpBC Strategy research teams engaged with ANPs across BC to look at Indigenous conceptions of wellness and balance in the workplace. This research also illuminated the importance of strengthening connections with Indigenous culture and values in the workplace (anpBC, 2012, 2013).

In a 2012 ANP survey, nearly 100% of respondents noted that healthy workplace relationships and leadership were important to them in the context of wellness in the workplace. For Aboriginal peoples, culture is a key component to this holistic understanding of wellness. Survey results also indicated that 93% of ANP sector employees and volunteers said they felt more fulfilled when culture is practiced and traditional values are present in the workplace (anpBC, 2012, p. 16). In the same survey, a strong majority of respondents (88%) stated they are more likely to work for and remain employed in an organization that incorporates culture (p. 17). These research results suggest that ANPs in BC would do well to place a high value on creating healthy workplaces that incorporate wellness and Indigenous culture.

Cultural awareness and cultural safety are becoming increasingly prevalent models in health care organizations to empower both staff and clients in the workplace. Cultural awareness and safety are achieved by educating community members on how to unlearn biases and engage with all cultures respectfully. By lifting up culture, we also create safe and empowering spaces for clients. By informing organizational frameworks with the values of culture and wellness, such as recognizing and addressing trauma, workplace wellness and work-life balance will be strengthened for employees.

The research also tells us that understanding the past helps us to understand our present situation and to envision where we want to go (anpBC, 2013, p. 8). This is a key action when designing and implementing culture and wellness plans because Indigenous worldviews are rooted in this continuity of tradition.

Recognizing the importance of continuity in Indigenous communities, it is important to ensure sustainability by incorporating culture and wellness into strategic planning as well as HR practices and policies. For example, in Indigenous communities, Elders pass down knowledge, skills, and value systems through the oral tradition; in today's ANP agencies, protecting the values of culture and wellness through policy is a way to reflect traditional practices like this at the organizational level. Definitions of culture and wellness may be different in each organization, but keeping these values in the fabric of the organization for the long term will ensure that the good work being done to lift up culture and wellness will be felt by the future generations of the organization. Healthy organizations

with strong culture and values as a foundation are also less susceptible to high staff turnover and changes in leadership.

## Other Sector Best Practices

There is a large body of knowledge confirming that people want to work in places where they are treated well and feel valued. Over the last several decades, research has emerged on the factors that drive employee satisfaction and how employers can help wellness thrive in the workplace.

There are common steps, such as providing supportive leadership, opportunities for career and salary growth, and exciting challenges that impact employee engagement (Province of BC, n.d.). However, the literature also highlights the value of wellness in the workplace, which should not be overlooked. The Canadian Cancer Society notes that focusing on wellness in the workplace can increase productivity and boost morale (Canadian Cancer Society, 2017). The BC Public Service also recognizes that empowerment, recognition, and a respectful environment are key building blocks of a healthy workplace (Province of BC, n.d.). Within an Aboriginal context, these values go hand in hand with the inclusion of culture so that Aboriginal employees and clients can feel empowered through their strong identities, recognized fully for who they are, and be given opportunities to participate in a respectful, culturally relevant environment.

The research conducted in the Aboriginal non-profit sector aligns strongly with best practice research globally. Organizational best practices identified through several sectors reveal similar traits in the conditions that can keep employees engaged and motivated (Canadian Cancer Society, n.d.; Province of B.C., n.d.). These include:

- A good workplace culture: where individuals are empowered to work together towards a common purpose and clearly defined goals in respectful environments, where workloads and expectations are effectively managed and employees are recognized for their contributions

- Physical environments that are safe, welcoming, and healthy, and employees have the tools (e.g., desks, chairs, computers, etc.) and spaces to effectively do their jobs

- Professional and personal development opportunities

- Adequate pay and benefits (including pension plans)

- Staffing practices and policies that are clearly defined and fair, supported by good communication.

## SECTION B: How to Get Started

Taking the time to define and plan your culture and wellness journey is a low-cost solution. It does not matter where you are currently at on your journey; there is something here for everyone. Whether your organization has a well-rooted wellness program or is just starting to look at the topic, this guide can help.

Remember, improving wellness and strengthening connections with culture is an ongoing process. The most important thing is to start and commit to the process, while embracing opportunities to grow.

### You may be asking yourself: What did I just get myself into?

It is true; this is going to take work! However, it is going to pay off in tangible rewards that make it all worthwhile. To get started, identify your achievements, celebrate them, and use them as a guiding force to work towards becoming the healthiest workplace possible.

> *Let go of any limiting beliefs you may carry and set your organization up for success by approaching this work with an open mind and an open heart.*

There are several ways that you can go about enhancing wellness and cultural practices in your organization. One common approach is planning.

There are three basic steps that you can follow to help you further develop culture and wellness in your organization: Reflect, Define, and Take Action!

### Reflect: "Find out where you are at"

Hold an initial talking circle or chat with the members of your organization to learn how each employee is feeling about his or her wellness and connection with culture. Find out what wellness and culture mean to the employees, clients, and community of your organization. What does your vision and mission statement or policies say about culture?

Be curious: think about what questions need to be asked and who to ask them of:

- What is already working well in your organization?

- How do you currently celebrate and honour culture and wellness in the workplace? How could you do more of that?

- How would you describe the current state of employee culture and wellness?

- How would you describe the current state of team culture and wellness?

- How would you describe the current state of the organization?

- Are you satisfied with your own wellness journey?

From the information you gather, is there interest and support from your team and organization to carry forward with planning?

Consider that:

- It is crucial to have both leadership support and staff engagement. Everyone needs to be on board.

- Creating a wellness or cultural committee can help you navigate the change process and ensure it is sustainable.

## Supporting Resources

The following tools help reflect on your current state:

- **Sections C, D, and E contain the following tools:**
    - ✓ **A self-reflection tool** to help gauge individual and organizational wellness
    - ✓ **A poster**, to spark self-reflection at the individual and organizational level

- **Non-Profit Board Self-Assessment**: This resource helps non-profits assess their performance and identify their priorities for board activities going forward (Appendix A)

- **A cultural self-reflection tool** to strengthen connections with culture and traditional Indigenous values in the workplace (Appendix C)

- **Terms of Reference for Wellness Committee** (Appendix D)

## Define Your Vision for Optimal Success

Think about your ideal work environment, what it would feel and look like, and what could help improve wellness and connections to culture in your workplace.

Analyze your surrounding environment, reflected by the following suggested questions:

- What ideas do you have to support culture and wellness in the workplace?

- What resources already exist?

- What resources need to be gathered?

- Are there any champions within the organization who will support the development of a culture and wellness plan?

- What kinds of programming would gather interest and engagement?

- Can you think of any neighbouring organizations that have implemented a plan that you can learn from?

- If not, are there examples of workplace wellness that you have done elsewhere? What makes them stand out to you?

- What are some no-cost / low-cost activities and programs that all staff can participate in (e.g., online resources like the First Nations Health Authority Journey to Wellness) (FNHA, n.d.).

Share and talk about the benefits of being culturally aware in the workplace. At the same time, talk about how you practice culture and wellness in the workplace. For example, should all staff meetings have Culture and Wellness as a standing agenda item? Perhaps it should be, and this is where you and others can promote wellness and exchange ideas to bring to practice within the organization.

Identify how you will keep track of progress and honour the good work being done in your organizational community. Celebrating milestones is an important part of wellness; make sure to create time to celebrate!

## Take Action: Come Together and Bring the Vision to Life

Move towards a shared vision in wellness and culture by setting goals and creating clear plans for achieving them. Keep your team and community engaged by:

- Encouraging everyone to participate in activities

- Creating a space for ongoing reflection so that each community member and employee can guide the direction of the plan

- Monitoring your progress

- Creating opportunities for healthy competition among departments.

Be flexible: Indigenous peoples have always adapted to the changing needs of their communities; recognize what is working and move in that direction.

## Then, Reflect . . . Again

Through many Indigenous worldviews, work is cyclical or seasonal. It is healing work to lift up culture and wellness in the workplace, and healing work is intergenerational, collective, and cyclical. In other words, it is a constant process of recognizing what you need, making it happen, and celebrating your successes with your community. Maybe you want your plan to reflect the seasons; what activities would you want to include for each season?

Create ongoing opportunities for reflection to create space for new ideas that can continue to lift up wellness and culture in the workplace.

> Workplace wellness is about caring for one another, and living and working with holistic practices that nurture the spiritual, mental, physical, and emotional aspects of a person, team and an organization. In the workplace, intergenerational connection by including Elders and youth plays an important role in learning how we take care of each other by looking to traditional teachings for guidance and to our future.

All of this information may sound a little overwhelming at first, but don't worry there are tools and resources to support you, your team and your organization in this important work.

**Supporting Tools:**

- *Pre-Planning Tool*
- *Steps to Creating a Culture and Wellness Plan*
- *Sample Agenda and*
- *Planning Template*

**Pre-Planning Exercise**

Use these guiding questions to help get you started.

1. Do any of your strategic or operational policies reference culture and wellness?

2. Do you have an existing culture and wellness plan, either adopted or in draft form?

3. Do you have confirmed attendance for the Introductory Meeting from Staff, Volunteers, Board members, and the Culture and Wellness Committee?

4. Do you have someone to open and close the Introductory Meeting with a Prayer?

5. Do you have someone to open the Introductory Meeting with local culture and wellness context?

6. Are there local supports that can assist you with your planning process (e.g., Indian Residential School Survivor Society, local mental health associations, local First Nations)?

7. Do you need, or would you benefit from, external facilitation to assist with the planning process?

8. Have you considered what type of environment would best support your Introductory Meeting (e.g., hosting the meeting offsite or onsite)?

9. Will you provide a meal at the Introductory Meeting as a means for the team to honour our teachings around sharing food?

**Steps to Creating a Culture and Wellness Plan**

| Introductory Meeting | Agenda co-created with staff, board, volunteers, and the culture and wellness committee | Meeting to define the reason for planning and the plan development process |
| Organizational Profile & Self-Reflection | Organization selects appropriate self-reflection tool to identify needs and priorities | Staff complete a self-reflection process using tool selected |
| Share Findings and Develop Plan | Staff meet to share findings and make suggestions for a path forward | Culture and Wellness Committee creates an action plan to address priorities |
| Plan Implementation | Committee shares plan with staff | Staff and teams are assigned responsibilities |
| Evaluation Planning | Develop an evaluation plan to monitor progress towards goals set in the action plan | Schedule and complete regular evaluations |
| Reassessment | Adapt the action plan based on evaluation findings | Conduct follow-up assessments. Are our actions contributing to the achievement of our goals? |

[Insert Organization's Logo]

**Culture and Wellness Plan Workshop Draft Agenda**

Date:

Time:

Location:

Opening Prayer

1. Local teachings on culture and wellness
2. What does culture and wellness mean to us?
3. What does culture and wellness look like in our organization?
4. Review mission and vision for the organization and how it fits with culture and wellness in the workplace
5. Self-reflection: Review self-reflection tools from handbook
6. Self-reflection exercise: Take care of yourself
   - Individuals complete exercise
   - Report back to the group
   - Group discussion on how the organization can support staff on their wellness journey
7. Identify next steps
8. Set next meeting date and agenda topics

Ceremony & Close

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**Culture and Wellness Planning Table Template**

Culture and Wellness Vision:

| Objective | Action | Champion | Performance Indicator | Timeline | Human and/or Financial Resources |
|---|---|---|---|---|---|
| What are you trying to achieve? | What tasks or methods will be used? | Which member(s) of our team will lead the action? | What are the measurable milestones that demonstrate success | Date | What supports will be allocated to achieve the action? |
| (WHY?) | (HOW?) | (WHO?) | | (WHEN?) | (WHAT?) |
| | | | | | |
| | | | | | |
| | | | | | |

# Pre-Planning Exercise

Use these guiding questions to help get you started.

1. Do any of your strategic or operational policies reference culture and wellness?

2. Do you have an existing culture and wellness plan, either adopted or in draft form?

3. Do you have confirmed attendance for the Introductory Meeting from Staff, Volunteers, Board members, and the Culture and Wellness Committee?

4. Do you have someone to open and close the Introductory Meeting with a Prayer?

5. Do you have someone to open the Introductory Meeting with local culture and wellness context?

6. Are there local supports that can assist you with your planning process (e.g., Indian Residential School Survivor Society, local mental health associations, local First Nations)?

7. Do you need, or would you benefit from, external facilitation to assist with the planning process?

8. Have you considered what type of environment would best support your Introductory Meeting (e.g., hosting the meeting offsite or onsite)?

9. Will you provide a meal at the Introductory Meeting as a means for the team to honour our teachings around sharing food?

## Steps to Creating a Culture and Wellness Plan

**Introductory Meeting**
- Agenda co-created with staff, board, volunteers, and the culture and wellness committee
- Meeting to define the reason for planning and the plan development process

**Organizational Profile & Self-Reflection**
- Organization selects appropriate self-reflection tool to identify needs and priorities
- Staff complete a self-reflection process using tool selected

**Share Findings and Develop Plan**
- Staff meet to share findings and make suggestions for a path forward
- Culture and Wellness Committee creates an action plan to address priorities

**Plan Implementation**
- Committee shares plan with staff
- Staff and teams are assigned responsibilities

**Evaluation Planning**
- Develop an evaluation plan to monitor progress towards goals set in the action plan
- Schedule and complete regular evaluations

**Reassessment**
- Adapt the action plan based on evaluation findings
- Conduct follow-up assessments

  Are our actions contributing to the achievement of our goals?

[Insert Organization's Logo]

## Culture and Wellness Plan Workshop
## Draft Agenda

**Date:**

**Time:**

**Location:**

Opening Prayer

1. Local teachings on culture and wellness

2. What does culture and wellness mean to us?

3. What does culture and wellness look like in our organization?

4. Review mission and vision for the organization and how it fits with culture and wellness in the workplace

5. Self-reflection: Review self-reflection tools from handbook

6. Self-reflection exercise: Take care of yourself

   - Individuals complete exercise
   - Report back to the group
   - Group discussion on how the organization can support staff on their wellness journey

7. Identify next steps

8. Set next meeting date and agenda topics


Ceremony & Close

## Culture and Wellness Planning Table Template

Culture and Wellness Vision:

_____

| Objective | Action | Champion | Performance Indicator | Timeline | Human and/or Financial Resources |
|---|---|---|---|---|---|
| What are you trying to achieve?<br><br>(WHY?) | What tasks or methods will be used?<br><br>(HOW?) | Which member(s) of our team will lead the action?<br><br>(WHO?) | What are the measureable milestones that demonstrate success? | Date<br><br>(WHEN?) | What supports will be allocated to achieve the action?<br><br>(WHAT?) |
| | | | | | |
| | | | | | |
| | | | | | |

## ABOUT THE CULTURE AND WELLNESS WHEELS AND HOW TO USE THEM

Sections C, D, and E offer self-reflection exercises to assist in identifying areas of strength and areas requiring further reflection and action.

Each section includes:
- A Self-Reflection Wheel
- Definitions for each section of the wheel
- Shared Responsibility Reflection
- Readiness and Planning Tool
- A Self-Refection Poster
- Culture and Wellness Strategies, and
- An Activity Related to the Theme

Each section is based on a theme; Take of Yourself, Take Care of Each Other, and Take Care of This Place. Each theme has a corresponding colour, cultural connection and icon connecting the theme to specific symbolism.

### 🪶 Take of Yourself

Cedar and eagle down represent the significance of self-care.

Cedar is considered a traditional medicine, often used in ceremony because of its powerful healing properties. It's roots grow deep and strong, representing stability and a solid foundation.

The eagle is believed to be the creature with the closest relationship with the Creator. Eagle feathers transmit vision and strength. Eagle down are the feathers grown closest to the eagle's heart. They are considered a symbol of peace, commonly used in blessing ceremonies. Eagles line their nests with down to provide warmth and comfort for their eaglets.

### 🐾 Take Care of Each Other

Wolves represent loyalty, protection, and strong family ties.

Wolves are respected for being very family oriented, social creatures. Their family system is similar to ours, consisting of parents, siblings, aunts, uncles etc. They care for one another, protect their elders, teach their young, and have the power to offer support for the most challenging healing journey.

"For the strength of the Pack is the Wolf, and the strength of the Wolf is the Pack" (Kipling, 1894).

## ⌄ Take Care of This Place

The Eagle's Nest represents where we live⸺our environment, our home.
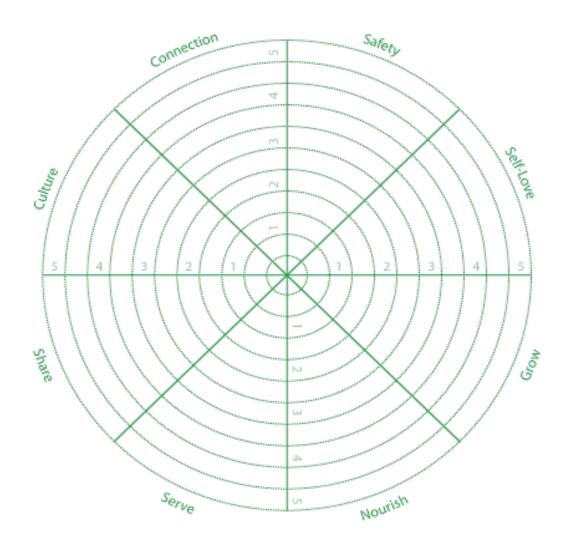
Male and female eagles build their nest together, which is part of their bonding experience. They use available natural resources from their environment and return to their nest every year, for as many as 35 years. They add to the nest each year as well as repair damage created by high winds.

Whether it's our room, our house, our neighbourhood, our community, our region, or our nation, . . . it is the responsibility of each one of us to take care of "this place."

## SECTION C: Take Care of Yourself

*Take Care of Yourself (Symbolism: Eagle Down & Cedar)*

*This wellness wheel is a self-reflection exercise to help get you thinking about the various aspects of your life. Through the wheel, we explore spiritual, physical, mental, and emotional well-being. Using the wheel below and the definitions on the following page, shade in your level of satisfaction, with 1 being very unsatisfied and 5 being very satisfied. How you feel today may be different than how you feel tomorrow. This is just a snap shot to help you see where you are at today and what areas in your life might benefit from a little extra love and attention.*

## Safety

- I set and respect personal boundaries

- I feel safe in my personal and professional life

- My basic needs for food, shelter, and friendship are met

- I surround myself in a circle of support comprised of healthy, loving people

## Self-Love

- I accept myself as I am and put my best version of myself forward most of the time

- I value and respect myself and choose who I surround myself with very carefully

## Grow

- I accept challenges and know they are opportunities for growth

- I seek opportunities to learn and practice new concepts

## Nourish

- I eat healthy, nutritional foods

- I have access to traditional teachers and cultural resources

- I nourish my body, mind, and spirit through diet, exercise, rest, and prayer

- I eliminate unhealthy thought patterns and replace them with helpful, nourishing thoughts

## Serve

- I serve my family, workplace, and community through volunteering and offering support

- I care and take action to improve the welfare of others, my community, and the environment

- I have a sense of purpose and contribute to the greater good in the world

### Share

- I give and receive support freely and without judgment

- I offer my skills and knowledge to others

- I contribute to my social networks

### Culture

- I honour the teachings of my family, clan, Nation, and community

- I give life to the values and history of my people

- I live a life that reflects my culture, values, and beliefs

### Connection

- I have a sense of belonging within my family, workplace, and community

- I connect with nature regularly

- I create space for fun, laughter, and joy with family and friends

### Shared Responsibility:

I recognize that I have a role and responsibility to *Take Care of Myself*. One way I commit to taking care of myself is to:

_____

Something my organization can do to help me *take care of myself* is:

_____

# Take Care of Yourself: Readiness and Planning Tool

✒ Reflecting on your Wellness Wheel, what are areas are going well?

_____

_____

_____

✒ Reflecting on your Wellness Wheel, what areas would you change if you could?

_____

_____

_____

✒ How would things be different if I made changes in these areas? What would that look like? What would that feel like?

_____

_____

_____

✒ Which comment best describes how satisfied you are with your life away from work?

| Very Unsatisfied | Unsatisfied | Satisfied | Quite Satisfied | Very Satisfied |
|---|---|---|---|---|

✒ Which comment best describes how satisfied you are with your work life?

| Very Unsatisfied | Unsatisfied | Satisfied | Quite Satisfied | Very Satisfied |
|---|---|---|---|---|

✒ Which comment best describes how ready you feel to make change for yourself?

| I haven't thought about change | Too challenging right now | I'm getting ready | I'm ready and taking steps now | I'm well on my way |
|---|---|---|---|---|

Which comment best describes how ready you feel to make change within your organization?

| I haven't thought about change | Too challenging right now | I'm getting ready | I'm ready and taking steps now | I'm well on my way |

What are some of the things you know you need to work on to help you be successful in making the changes you want?

_____

_____

_____

Who are some of the supporters who can help you?

_____

_____

_____

If you had three wishes, what would you wish for?

1._____

2._____

3._____

## Take Care of Yourself Check In

I give myself permission to take care of myself.

I set healthy boundaries.

I create space for myself to participate in culture and wellness activities.

### WHERE AM I ON THE SELF-REFLECTION PATH?

I haven't thought about this yet
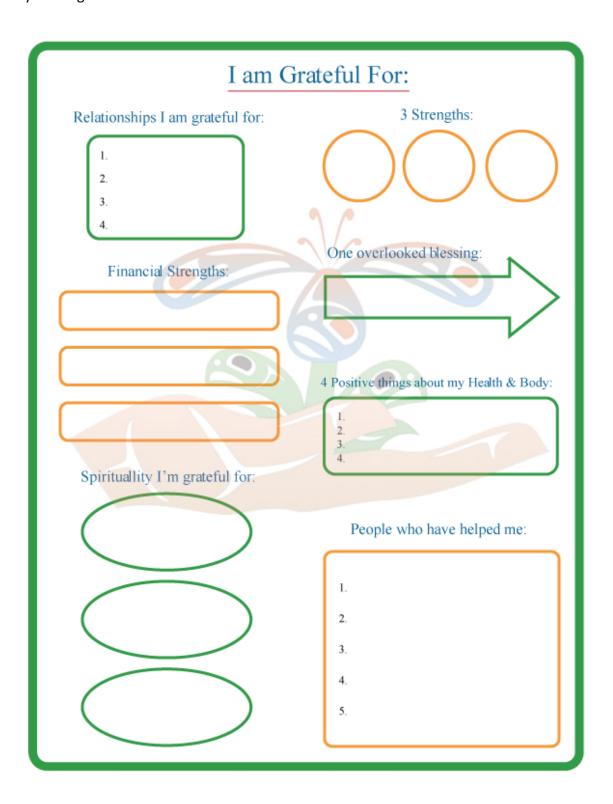
Too challenging at the moment

I'm thinking about doing this

I've started taking action

I'm well on my journey

## Strategies for Taking Care of Yourself

1.  Connect with nature. Take a 15-minute stroll outside in the fresh air.

2.  Read for an hour.

3.  Enjoy a long bubble bath or shower and wash away any stress or worry.

4.  Connect with a friend you haven't seen for a while, have them over for tea.

5.  Unplug—disconnect from social media, TV, and your phone. Even if it is just for an hour, you will find yourself recharged by the break from the electronic noise you were inundated with.

6.  Write in a journal, list the things you are grateful for.

7.  Exercise! See if you can find a Spin, Zumba, or group fitness class; often gyms offer your first class for free.

8.  Listen to music! Play your favourite song first to get your energy flowing.

9.  Make a collage or vision board of the people, places, and things you want to attract into your life.

10. Watch a funny movie and enjoy some popcorn while you're at it!

11. Tell someone you love them and share at least three reasons why.

12. Watch an inspirational video from the Simple Truths website: www.simpletruths.com
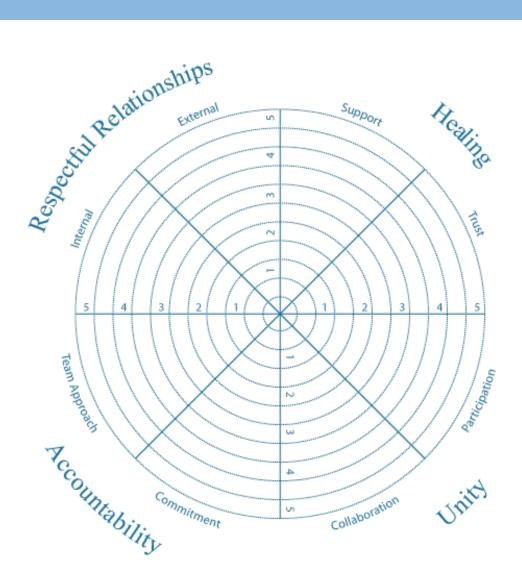
Practicing gratitude is one way for us to take care of ourselves. This exercise can help you reflect on what you are grateful for.

## I am Grateful For:

**Relationships I am grateful for:**

1.
2.
3.
4.

**3 Strengths:**

**Financial Strengths:**

**One overlooked blessing:**

**4 Positive things about my Health & Body:**

1.
2.
3.
4.

**Spirituallity I'm grateful for:**

**People who have helped me:**

1.
2.
3.
4.
5.

## SECTION D: Take Care of Each Other

*Take Care of Each Other (Symbolism: Wolf Pack / Paw)*

*This wellness wheel is a self-reflection exercise to help you consider the various aspects of relationships within the workplace. Through the wheel, we explore how we work with and support each other. Using the wheel below and the definitions on the following page, shade in your level of satisfaction with 1 being very unsatisfied and 5 being very satisfied. How you feel today may be different than how you feel tomorrow. This is just a snap shot to help you see where you are at today and what areas in your work relationships might benefit from a little extra care and attention.*

### Respectful Relationships

- **Internal**
  - Staff, volunteers, and board members understand how individuals' roles, strengths, and differences (e.g., working styles, personalities) can complement that of their co-workers.
  - We treat each other with dignity and respect. We honour our teachings including the Traditional Native Code of Ethics (Four World's Development Project, 2014).
  - Employees get to know each other through eating together, gathering medicines together, enjoying fitness activities together, etc.

- **External**
  - We see value in strategic partnerships and seek to build and maintain helpful partnerships with external organizations.
  - Our organizational structure (including reviews and promotions) is built around internal cooperation (versus competition).
  - Our organization acknowledges the benefit of working in an interdisciplinary /interdepartmental way (versus working in silos). Methods are utilized to support collaboration.

### Healing

Healthy people contribute to healthy organizations and communities. As ANPs seek to become healthy, sustainable organizations, we must incorporate healing into our service delivery models and staff resources.

- **Support**
  - We provide culturally relevant programs and supports for those we serve as well as offer culturally appropriate employee assistance programs to the support physical, mental, emotional, and spiritual health of our staff, volunteers, and board members.
  - Our behavior reflects traditional teachings on loving, respecting, supporting, and caring for each another.

- **Trust**
  - We know and practice behaviours that lead to our collective well-being and avoid those that lead to our destruction.

### *Unity*

Unity means oneness. Without unity, the common oneness that makes (seemingly) separate human beings into "community" is impossible. Disunity is the primary disease of community" (Bopp & Bopp, 2001, p. 197); therefore, lack of trust in the workplace can also contribute to disease in the workplace.

### *Collaboration*

We encourage unity, while respecting individual strengths and gifts.
We work together to achieve our collective goals.

### *Participation*

We participate in professional development activities and contribute to organizational activities.

### *Accountability*

- 🐾 **Teambuilding**
  - Our team walks the talk, cares about the rest of the team, and contributes to the development of team. This supports team accountability and accountability to the organization and the people we serve.
  - We have clearly defined roles and live them with passion. We recognize it is an honour to serve our own people and take that role seriously.

- 🐾 **Commitment**
  - We regularly require our team members to verbally report on specific deliverables, projects, goals, and action plans.

### *Shared Responsibility*

I recognize that all volunteers, staff, and board members have a role and responsibility to take care of each other. One way I commit to taking care of each other in the workplace is to:_____

Something my organization can do to help me *take care of each other* in the workplace is:


_____

## Take Care of Each Other: Readiness and Planning Tool

🐾 Reflecting on your Wellness Wheel, what are areas are going well?

_____

_____

_____

🐾 Reflecting on your Wellness Wheel, what areas would you like to change?

_____

_____

_____

🐾 How would things be different if your team made changes in these areas? What would that look like? What would that feel like?

_____

_____

_____

🐾 Which comment best describes how satisfied you are with your internal and external relationships at work?



| Very Unsatisfied | Unsatisfied | Satisfied | Quite Satisfied | Very Satisfied |

🐾 Which comment describes how satisfied you are with the overall health and culture of your team?

| 🐾 | 🐾 🐾 | 🐾 🐾 🐾 | 🐾 🐾 🐾 🐾 | 🐾 🐾 🐾 🐾 🐾 |
|---|---|---|---|---|
| Very Unsatisfied | Unsatisfied | Satisfied | Quite Satisfied | Very Satisfied |

🐾 Which comment best describes your team's readiness for change?

| 🐾 | 🐾 🐾 | 🐾 🐾 🐾 | 🐾 🐾 🐾 🐾 | 🐾 🐾 🐾 🐾 🐾 |
|---|---|---|---|---|
| I haven't thought about change | Too challenging right now | I'm getting ready | I'm ready and taking steps now | I'm well on my way |

🐾 What are some of the things you know your team needs to work on to promote unity, healing and accountability within the team?

_____

_____

_____

🐾 Who are some of the supporters, Elders, and leaders, etc., who help the team?

_____

_____

_____

🐾 If you had three wishes related to the way your team relationships, what would you wish for?

1._____

2._____

3._____

## Take Care of Each Other Check In

🐾 We provide a safe, supportive work environment based on trust and respect for one another.

🐾 We create opportunities for teambuilding and leadership throughout our organization.

🐾 We provide programs that respond to community needs.

🐾 We build collaborative partnerships with our neighboring organizations.

**WHERE ARE WE ON THE SELF- REFLECTION PATH?**

| We haven't thought about this yet | We are not sure where to start | We are thinking about doing this | We have taken our first steps | We are on our journey and doing well |

## Strategies for Taking Care of Each Other

- Seek opportunities to participate in professional development

- Connect with co-workers

- Stay informed and engaged by participating in staff meetings

- Seek regular feedback and guidance from your supervisor and peers

- Have a peer support group

- Take time to debrief either as a team or one-on-one

- Create a workspace that reflects your style and needs

- Have a "Lunch and Learn" where staff share meals and knowledge together

- Set and honor healthy boundaries with those you serve and your peers

- Balance your day with a variety of activities (computer time, physical activity, meetings etc.)

- Take a break if you need one (listen to a song for 5 minutes, walk to the water cooler and fill your water bottle or stretch)

- Give a High Five to someone who has positively contributed to your day, let them know you appreciate them

Having fun and playing games together is one way to build relationships. The scavenger hunt activity can help your team learn valuable lessons on cooperation and teamwork. This activity works best off-site at a public space (i.e. public park or conference space).

## Spring / Summer Team Scavenger Hunt

**Team Name:**

- A business card from someone other than a staff member
- A restaurant napkin
- An autograph from a stranger (bonus points if they are from another country)
- A picture of a team member going down a slide (bonus points for a picture of your whole team going down the slide together)
- A coupon for at least 15% off
- A signature from someone who has worked in the Aboriginal Non-Profit Sector for more than 10 years
- A team picture with at least one person not touching the ground
- Do an act of kindness for a stranger
- A 1946 - 1952 coin
- A picture of something that makes you proud to work for your organization
- A feather
- A safety pin
- A picture of someone who plays on an Indigenous sport team
- A picture of a couple who has been married more than 20 years
- A pine cone

## Take Care of This Place

*Take Care of This Place (Symbolism Eagle's Nest)*

*This wellness wheel is a self-reflection exercise to help you consider the various aspects of your organization (This Place). Through the wheel we explore the various values, systems and supports within your organization. Using the wheel below and the definitions on the following page, shade in your level of satisfaction, with 1 being very unsatisfied and 5 being very satisfied. How you feel today may be different than how you feel tomorrow. This is just a snap shot to help you see where you are at today and what areas in your work relationships might benefit from a little extra care and attention.*

### Leadership

✔ Vision & Planning: Programs are responsive to community and client needs.  We set short term, mid-term and long-term goals. We monitor outcomes monitored and adapt approaches if necessary.

✔ Policy & Practice: Roles, responsibilities, expectations and procedures are clearly defined. Policies and practices and consistently applied.

### Culture and Wellness

✔ Sense of Belonging: Our organization provides opportunities for staff to contribute to policies that directly affect them. Our policies help workers have a sense of control over their workload, work-life balance, and provide opportunity for recognition and advancement.

✔ Principles and Practice: Traditional teachings and values are an intrinsic part of our organizational structure. We include elders and youth in our program planning and delivery.

### Sustainability and Agility

✔ Resources: Our funding resources stable and diversified. Our organization has measures in place to ensure financial accountability.

✔ People: We provide a supportive environment, realistic workloads, performance appraisals and training opportunities for all staff. We invest in our employees and support opportunities for growth and advancement. We have adequate resources to meet the needs of our communities we serve.

### Health and Safety

✔ Respectful Workplace: Safe spaces created so important issues can be talked about and addressed respectfully. All members of our organization are equally valued. Relationships based on trust and mutual respect.

✔ Physical Space: Our space warm, welcoming and safe. We promote workplace health and safety in all our buildings and spaces including supportive activities. We have a health and safety committee to ensure we are meeting or exceeding safety requirements.

## *Shared Responsibility*

I recognize that all volunteers, staff, and board members have a role and responsibility to *take care of this place*. One way I commit to taking care of this place is to:

_____


Something my organization can do to help me take care of this place is:

_____

## Take Care of This Place: Readiness and Planning Tool

✔ Reflecting on your Wellness Wheel, what are areas are going well?

_____

_____

_____

✔ Reflecting on your Wellness Wheel, what areas would you like to change?

_____

_____

_____

✔ How would things be different if your organization made changes in these areas? What would that look like? What would that feel like?

_____

_____

_____

✔ Which comment best describes how satisfied you are with the leadership and governance of your organization?

| Very Unsatisfied | Unsatisfied | Satisfied | Quite Satisfied | Very Satisfied |
|---|---|---|---|---|

✔ Which comment describes how satisfied you are with the overall culture and wellness of your organization?

| Very Unsatisfied | Unsatisfied | Satisfied | Quite Satisfied | Very Satisfied |
|---|---|---|---|---|

✔ Which comment best describes your organization's readiness for change?

| Very Unsatisfied | Unsatisfied | Satisfied | Quite Satisfied | Very Satisfied |

✔ What are some of the steps your organization needs to take to "take care of this place?"

_____

_____

_____

✔ Who are some of the supporters, elders, and leaders etc. that help the team?

_____

_____

_____

✔ If you had three wishes related to the way your team relationships, what would you wish for?

1._____

2._____

3._____

## Take Care of This Place Check In

✔ Integrity – We walk our talk and our space reflects our values.

✔ Respect – respect and honour for self so I can respect and honour others and respect and honour this place.

✔ Humility – we walk lightly and choose our words carefully, we acknowledge life lessons when they present and we are humble.

✔ Connectedness– our space, our relationships and our guiding values celebrate our connections with the Creator, our community, our partners and each other.

| INTEGRITY | RESPECT | HUMILITY | CONNECTEDNESS |
| --- | --- | --- | --- |

### WHERE ARE WE ON THE SELF- REFLECTION PATH?

| We haven't thought about this yet | We are not sure where to start | We are thinking about doing this | We have taken our first steps | We are on our journey and doing well |
| --- | --- | --- | --- | --- |

## Take Care of This Place Strategies

✔ Increase awareness of your organization's policies by including a copy of single policies with each pay stub. Have pop quizzes for prizes with staff at your meetings. Informed and engaged staff or more likely to follow policy when they have awareness and understanding of it.

✔ Hosting a potluck lunch with ethnic and traditional foods can help foster a sense of belonging and create connections amongst volunteers, staff, and board members. Ask everyone to bring one of their favourite dishes that reflect their ethnicity or territory. Sit as a family and enjoy good company and good food in your place.

✔ Create comfort and connection through sharing part of your story with people who access your place. Post a picture of yourself with your name and interesting details on your door (e.g., where you are from, a little bit about your family, how long you have worked at the organization, etc.). Including what you love about your job and "this place" can also help others have a greater understanding about who you are and what is important to you.

✔ Create a sacred space in your place. Display your pipes, drums, smudge bowls, and medicines for all to see. Having these items on display in a place of honour conveys to others that our teachings and culture are important to us. It is also helpful to have them readily available for important events and ceremonies.

✔ Brushings and cleansing help clear and clean your space. These ceremonies assist in reminding us of the sacred work that occurs within the four walls of the building. This work connects us to our culture, teachings, and values. You may want to invite a traditional healer or Elder to lead this ceremony and share the spirit and intent of this sacred work with your entire staff, volunteers, and board.

# Take Care of this Place Activity

Taking care of this place on the surface may seem like it is all about the physical environment, and that is a part of taking care of this place. However, there is more.

Start looking at your place holistically, which incorporates your physical surroundings, your social and emotional environment, and your governance systems.

Start training yourself to look at your place through a different lens. Begin identifying where you can make improvements or where you have the influence to make improvements. Some tasks you may not be able to manage on your own—so try to engage others who can assist you and help you take care of your place.

## *Physical Environment*

Try this simple activity to start—have a purpose when you are walking from A to B. Specifically, explore your office space, common areas, and such, where you can make an improvement. Pick something easy to start off with, like housekeeping, signage, and wear and tear. You may be surprised on how much you will see that you have walked by every day that just blended into your surroundings.

To set yourself up for success and avoid being overwhelmed, pick one thing that you can change yourself, and do it. It could be as simple as removing outdated notices on the bulletin board or emptying the recycling bin. It could even be picking up garbage on the walk from your parking spot to the entrance of your building.

## *Emotional / Social Environment*

To help improve the social and emotional health of this place, start using that new lens to look at old challenges. When participating in a staff meeting or enjoying your break, start noticing who is not included in or participating in activities. Reach out to that person and include him or her. Ask questions about what projects the staff person is currently working on or if he or she would be interested in helping you tidy up the staff room. Connecting with and working side-by-side with others builds camaraderie, and soon, you may have a whole army pitching in to help you take care of your place.

## *Governance and Mission Statement*

Posting your mission statement in high traffic areas communicates to others what your place is all about. It can also serve as a respectful reminder of the responsibilities staff carries in serving this place. Post your mission statement in a place of honour. Much thought and care went into the spirit and intent of this statement; make sure it receives the respect and attention required to serve this place in Referthe way that would make the authors of such statements proud.

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# APPENDICES

Appendix A: McKinsey & Company Non-Profit Board Self-Assessment

Appendix B: ANP Self-Reflection Guide for Strengthening Connections with Culture and Traditional Values in the Aboriginal Non-profit Workplace

Appendix C: Culture and Wellness Self-Reflection Tool

Appendix D: Culture and Wellness Committee Terms of Reference Template

Appendix E: Bingo Game

Appendix F: Sample Pet Policies

Appendix G: Cultural Leave Policies

## Appendix A: McKinsey & Company Non-Profit Board Self-Assessment

**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

### OVERVIEW

The Nonprofit Board Self Assessment Tool is designed to help nonprofit organizations assess their board's performance and identify priorities for board activities going forward.  We believe this combination of performance assessment and priority-setting is the foundation of superior nonprofit board performance over time.  The tool should be used with our framework for nonprofit board responsibilities, which describes in detail the key elements of effective nonprofit board governance.  The output of the assessment is intended to focus discussion among board members around the governance activities that will result in the greatest benefit for the organization.  The tool may be used by nonprofit managers and board members:

- To identify the areas of board performance that are strongest and those that need improvement

- To identify priority areas for the board to focus on over the next 1 or 2 years

- To allow different views to emerge – the difference between responses given by two groups of board members or by the board and senior staff can be tracked and used to start a discussion

Superior board performance across the full range of nonprofit institutions cannot be precisely defined.  Distinctive performance for each of the dimensions is therefore not intended to be precisely accurate for any single institution.  In fact, institutions rarely need to perform at a distinctive level in every area.  A board committee, rather than the entire board, can often handle specific responsibilities and bring topics forward for full board discussion as needed.  Respondents should use their best judgment to rate their board in the spirit if not in the letter of the performance description.  The scores are meant to provide a general indication – a "temperature" taking – of a board's performance, in order to identify potential areas for improvement.

Please make generous use of the comments section to expand on or explain your ratings.   We typically find summaries of anonymous comments as helpful as the ratings themselves in surfacing issues.

This tool is meant to create an informed starting point for discussion among the leadership of a nonprofit.  Informed discussion and commitment to address priorities results in board effectiveness.   We encourage you to adapt the tool to meet your own organization's governance needs, and we appreciate any feedback on how to improve the usefulness of this tool.

Page 1 of 22

**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

### GUIDELINES FOR ASSESSORS

The Nonprofit Board Self Assessment Tool has three sections:

1. Performance of the board (or board committee) on its core responsibilities
2. Perceived importance of responsibilities for the next 1-2 years
3. Quality of enablers in place to support board effectiveness

In sections 1 and 3,  '"Performance of board on its core responsibilities" and "Enablers of board effectiveness," mark the box in each row that is closest to describing the situation at hand; descriptions will rarely be a perfect match, so use the comments section to expand on any aspect of performance that you wish.

If a row is not relevant to the organization assessed, write "N/A" in the comments section; if you simply have no knowledge, write "D/K."

For each of the responsibilities in Section 2, "Perceived importance of responsibilities for the next 1-2 years," indicate how important you believe it will be for the board to focus on each area in order to make the most positive impact on the performance of the organization.  Since the board cannot focus on all responsibilities with equal weight at the same time, the ratings are intended to indicate relative priorities for each responsibility.

Please return your completed tool to the administrator, who will collate the results and compile an anonymous summary of comments for board discussion.

Please identify your role in the organization:
Board Member _____                Management_____                Other_____

**Approximate time needed for completion: 30 minutes**

**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

## AREAS COVERED BY THE ASSESSMENT'S THREE SECTIONS

### SECTION 1: PERFORMANCE OF BOARD ON ITS CORE RESPONSIBILITIES

**Shape mission and strategic direction**
- Clarify mission and vision
- Participate in and approve strategic and policy decisions

**Ensure leadership and resources**
- Select, evaluate, and develop CEO
- Ensure adequate financial resources
- Provide expertise and access for organizational needs
- Build reputation

**Monitor and improve performance**
- Oversee financial and risk management
- Monitor organizational performance
- Improve board performance

### SECTION 2: PERCEIVED IMPORTANCE OF RESPONSIBILITIES FOR THE NEXT 1-2 YEARS

### SECTION 3: QUALITY OF BOARD EFFECTIVENESS ENABLERS

- Size and structure
- Composition
- Leadership
- Processes

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

**SECTION 1: PERFORMANCE OF BOARD ON ITS CORE RESPONSIBILITIES**

| Shape the mission and vision | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Common understanding of mission** | Active and open disagreement about mission | Board members appear to share surface understanding of mission; disagreements may exist at deeper level although they have not been raised | Board members share common understanding of mission although it has not been stressed tested through discussion | All board members share a common understanding of the mission that has been stress tested through discussion | |
| **Common understanding of vision (i.e., what the organization aspires to become in 5 years)** | Board members lack understanding of vision is as distinct from mission | Vision not formalized; board members' understanding of vision not aligned with likely disagreement over what is achievable | Board members appear to have a common understanding of the vision; vision not documented and/or lacks concrete goals | All board members share common understanding of where organization wants to be in 5-10 years; vision is well documented with concrete goals | |
| **Use of mission and vision in policy/strategy decisions** | Board members do not refer to mission and vision in their discussions on policy/strategy | Board members infrequently refer to mission and vision in discussions on policy/strategy | Although not formalized, board members frequently refer to mission and vision in discussions on policy/strategy | All major policy/strategy discussions include explicit consideration of fit with mission and vision | |
| **Process for raising mission and vision issues** | Board has no formal process to engage board in reviewing the mission and vision | Informal discussion within small groups on mission or vision; Issues of mission/vision rarely raised to board for broad discussion | Informal and active discussion within small groups with issues (e.g., relevance of mission) brought before the board on ad-hoc basis when there is enough momentum | Formalized process (e.g., board retreats) to foster active board member participation in examining mission-related issues | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

**SECTION 1: PERFORMANCE OF BOARD ON ITS CORE RESPONSIBILITIES**

| Engage in strategic planning and policy decisions | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Process for strategic planning and quality of board participation** | No formal process for strategic planning and little takes place | Formal process exists but used on ad-hoc basis; mainly staff driven with very little involvement by board members in developing the plan; board largely "rubber stamps" plan with limited discussion | Process exists for developing strategic plan but does not specify the framework for strategic planning (e.g., main elements/issues that plan must address); mainly staff-driven; active discussion by the entire board before approving the strategic plan | Formal process for board involvement that specifies broad framework (timing and content) for strategic planning; joint board and staff ownership of strategic plan with some board members heavily involved; active discussion by the entire board supported by needed facts/materials before final approval | |
| **Quality of strategic plan** | No formal plan; board members/staff would not describe key points of the strategy in the same way | Strategic plan exists but has major holes in one or more of: goals, situation analysis, options considered, expected outcomes, resource implications, responsibilities | All key strategic elements addressed in plan; clear linkage of programs to mission and vision; unresolved issues identified for further investigation | Robust plan covers all key strategic elements; agreed upon program outcomes are tightly linked to mission and vision and results inform subsequent decisions; clear plan for closing resource gaps if any | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

| Engage in strategic planning and policy decisions | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Agreement on distinction between board-level and management-level decisions** | There is frequent disagreement between board/individual members and staff on appropriate level of board involvement in issues; CEO/staff feel "micromanaged" or "unsupported"; board feels disconnected | Debates, when they occur, usually involve the behaviors of one/a few members; board/staff feel surprises (need for rapid decisions or surprising decision outcomes) occur more frequently than necessary | Board and staff have high-level understanding of distinction between board and management decisions; all parties believe current model generally works well, but a few notable surprises mark recent history | Board and staff have a shared understanding of relative roles (written or explicitly discussed); all parties feel their views are heard in the process; frequent interaction between CEO and Board Chair ensure "no surprises" environment | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

**SECTION 1: PERFORMANCE OF BOARD ON ITS CORE RESPONSIBILITIES**

| Select, evaluate and develop CEO | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Succession planning** | Board has no clear succession plan | Board has informal discussion with CEO on succession and on identifying candidates before need for a CEO transition arises | Board has explicit view on succession and works with CEO to identify internal candidates with leadership potential | Board has explicit view on succession and actively works with the CEO to identify internal candidates and provide development opportunities for the top 3-5 candidates to "round out" their skills | |
| **Evaluation and development process** | Evaluations are subjective and occur on ad-hoc basis; most board members are unaware of process or feedback messages | Evaluations performed annually against pre-agreed criteria; board members have opportunity to provide input to process | Evaluations performed formally and at least annually against pre-agreed criteria; written feedback messages reinforced through CEO compensation | Evaluations performed at least annually against pre-defined criteria; evaluation includes 360-degree feedback and includes a self-assessment by the CEO. Written feedback includes skill development plan. CEO compensation decision reinforces view of performance | |
| **Search process (when required)** | Little discussion of criteria for new CEO; roles/decision-making process unclear | Limited discussion of criteria and search plan by board; board members feel "left out" of process; frustration with quality of candidates considered | Formal criteria and plan discussed at board; internal and external candidates considered and at least one strong candidate emerges | Formal search criteria, expectations for first 2 years, and search plan receive broad board support; internal and external candidates reviewed and "true choice" between qualified candidates can be made | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

**SECTION 1: PERFORMANCE OF BOARD ON ITS CORE RESPONSIBILITIES**

| Ensure adequate financial resources | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Financial needs assessment** | No clear understanding of gaps in resources needed | Board has some understanding of resources needed, mainly from discussions around budget | Board understands gaps in resources needed for coming year and feels "ownership" of need, given the potential impact on current programs | Board works with staff as a part of strategic planning process to develop a multi-year view of funding requirements and trade-offs embedded in different resource levels; board feels strong ownership for the targets | |
| **Individual donations to the organization** | Individual board members' financial support is inconsistent and routinely misses goals set for the board; board members are unclear on collective and individual expectations | Board members' financial support varies by individual; Some board members give consistently; others could give/were expected to give more; expectations for support not well understood prior to joining board | Most board members donate consistently to the level they are expected to give; board meets but does not usually exceed "'donation" goals | All board members financially support organization, which is a priority for each board member's charitable giving; board consistently meets/ sometimes exceeds "donation" goals | |
| **Involvement in fundraising planning and execution** | Board members' role in raising funds is not commonly shared and involvement in fund-raising is isolated in a few directors. | Board occasionally introduces staff to contacts for fund-raising but no systematic effort undertaken | Directors acknowledge fund-raising responsibility and work with staff to develop fund-raising plan and introduce staff to contacts with some frequency | Board and staff develop clear plan to meet fund-raising targets; board introduces staff to potential donors and drives fund-raising activities when necessary | |

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McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM

### SECTION 1: PERFORMANCE OF BOARD ON ITS CORE RESPONSIBILITIES

| Provide expertise and access for organizational needs | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| Board understanding of needed access and influence to support organizational objectives, (e.g., legislative access, community access) | Topic of access not specifically discussed or seen as source of board assistance to organization | Board understanding of needs for access based on periodic requests from CEO; needs largely determined on reactive basis to need of the moment | Board understands needs based on strategic planning discussions with CEO/staff, although specific plans or relationship goals are not identified | Needs for access and influence based on strategic view of organizational objectives; needs identified in detail to allow meaningful roles to be identified for individual directors | |
| Ability of board to provide access and influence needed | Board plays no role providing access or influence for organizational needs | Board provides access and influence sporadically but many needs not addressed, or support is seen to be of little value to the organization | Board provides access to most needed individuals and institutions; access and influence seen as of moderate value to institution | Board proactively reaches out to further organizational goals and is frequently very influential in achieving them | |
| Board understanding of expertise needed for organizational objectives, e.g., financial, strategic, subject matter expertise | Topic of expertise not specifically discussed or seen as source of board assistance to organization | Board understanding of needs for expertise based on periodic requests from CEO, needs largely determined on reactive basis to need of the moment | Board understands needs based on strategic planning discussions with CEO/staff | Needs for expertise based on strategic view of organizational objectives; needs identified in detail to allow meaningful roles to be identified for individual directors | |
| Ability of board to provide expertise | Board does not see providing expertise as a vital role and rarely offers assistance | CEO reaches out to individuals for assistance; help generally seen as of modest value to organization; some gaps in available expertise versus needs | Board members volunteer/ access expertise and can cover most typical needs; skills seen as valuable to organization | Board expertise addresses most needs and is seen as source of distinctive value to organization | |

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| Build reputation | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| Board understanding of reputation objectives and of the role the board can play in building/enhancing reputation | Topic of building reputation not a priority and not specifically discussed/seen as a board role | Reputation objectives understood in vague terms with little differentiation of the message between target communities | Board understands key goals and differences between target communities; plan for board activity is largely undeveloped | Needs for reputation building based on strategic view of organizational objectives; needs identified in detail to allow meaningful roles to be identified for individual directors | |
| Board effectiveness in enhancing reputation of organization in the relevant communities | Board plays almost no role in helping build/enhance the reputation of the organization in relevant community | Individual board members participate when invited to community events; effectiveness of board activity unclear | Gaps exist vis-à-vis some key constituencies; board member effectiveness as reputation builders varies greatly | Board members proactively reach out in community to build awareness and excitement about the organization; board members seen to be very effective ambassadors for organization | |

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McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM

**SECTION 1: PERFORMANCE OF BOARD ON ITS CORE RESPONSIBILITIES**

| Oversee financial performance, ensure risk management | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Board role in financial planning** | 1-year budgets prepared with little input from board | Board actively reviews annual financial plan; investment objectives generally understood, but not clearly communicated to fund managers | Board reviews and approves 3- to 5-year financial plan; written investment policy guides actions of fund managers | Board's active involvement in preparing/reviewing multi-year financial plan results in robust discussion of resource allocation, funding plans, and investment objectives in context of strategic goals | |
| **Ongoing monitoring of financial and investment performance** | Sporadic or infrequent review of results vs. budget with little opportunity for timely intervention; few board members feel they understand financial reports | Board monitors financial statements at set intervals (monthly or quarterly); open issues requiring more investigation or "surprise results" are common occurrences | Board monitors financial results regularly; staff can answer most questions and responds in timely and thoughtful manner to more complex inquiries; discussion not as "forward-looking" as some board members would like | Board monitors financial statements regularly; key performance indicators routinely reported to whole board; well-prepared staff can explain variances and discuss potential corrective actions; "no surprises" because of trust-based communication with staff | |
| **Fiduciary and other regulatory compliance** | No independent audit of financial results or processes; Limited understanding of the compliance required to regulatory bodies | Independent audit performed and results discussed between board and auditor; little board involvement with compliance to other regulatory bodies | Independent audit performed; results discussed with the board; doard reviews reports to/from key regulatory bodies | Board ensures timely, independent audit of results and internal processes; board understands compliance required to regulatory bodies; feedback from auditors/regulators forms basis of recovery plan monitored by board | |

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McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM

| Oversee financial performance, ensure risk management | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Board role in risk management** | No clear understanding or discussion of risks/ exposures facing organization | Some discussion of key risks and mitigation strategies (insurance), but effort is largely ad hoc or in response to an event and does not cover all major exposure categories | Board annually reviews financial and other risks as well as mitigation policies, but surprises regarding exposure or gaps in coverage do occur | Board annually reviews potential sources of risk and mitigation plans; surprises or gaps in coverage are few | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

**SECTION 1: PERFORMANCE OF BOARD ON ITS CORE RESPONSIBILITIES**

| Monitor performance and ensure accountability | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Board involvement in developing performance metrics** | Performance against mission is discussed infrequently with no pre-determined goals | Discussion of strategy leads to setting programmatic goals for year.  Most goals focus on activity levels (e.g., meals served) | Board works with staff to set goals for 1- to 3-year period; metrics include activity levels and some efficiency or effectiveness measures | Board works with staff to set outcome based metrics and goals as well as activity/efficiency metrics; targets set for 1 to 3 year period.  Performance of comparable institutions is used to inform targets | |
| **Process for monitoring performance** | No formal process for monitoring program performance exists | Infrequent discussion of performance and no feedback to the strategic planning or CEO evaluation | Routine discussion of performance against programmatic objectives but no clear feedback mechanism into strategic planning or CEO evaluation | Board routinely monitors and discusses the performance of program/organization and uses results to inform the strategic plan, resource allocation, and evaluation of the CEO | |
| **Board understanding of accountability** | Board does not view itself accountable to any stakeholders | Limited discussion of accountability.  Divergent views regarding key stakeholders | Board discussion of accountability occurs in unstructured format results in consensus; discussion not turned into action, e.g., stakeholders communications | Board identifies primary stakeholders and ensures that performance results are communicated effectively to the stakeholders | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

| Monitor performance and ensure accountability | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Process for obtaining and using feedback from stakeholders** | Board has no process to obtain feedback from mechanism stakeholders | Feedback from stakeholders is limited to presentations by staff or "highlights"/ presentations/ interactions with service recipients at board meetings; not all stakeholders represented. | Board does receive positive and negative feedback from stakeholders but feedback is anecdotal; board discusses feedback with CEO/staff and agrees on areas of improvement | Board has formal process in place (e.g., stakeholder committee) to obtain feedback from stakeholders without filters by the staff; board ensures that the results from the stakeholder feedback are used to inform strategy and resource allocation | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

**SECTION 1: PERFORMANCE OF BOARD ON ITS CORE RESPONSIBILITIES**

| Improve board performance | 1 Poor | 2 Average | 3 Good | 4 Distinctive | Comments |
|---|---|---|---|---|---|
| **Goal setting for the board as a follow-on to strategic planning** | No specific goals exist for the board | Board translates strategic plan into goals in an ad-hoc manner and does not assign responsibilities to board committees | Board translates strategic plan into goals only in certain categories like fund-raising | Board translates the strategic plan for the organization into a set of concrete goals for the board and board committees, including timelines and required staff support | |
| **Evaluation of board performance against goals** | No evaluation is conducted by the board on its performance against the goals | Board informally evaluates its performance on major objectives | Board formally evaluates its performance on major goals but no feedback mechanism exists to improve board functioning | Board evaluates its performance against the goals and uses the lessons learned to develop plans to improve board effectiveness | |
| **Process for evaluating individual directors** | No process in place for individual member performance | Evaluations of individual directors occur informally as part of re-nomination process. Evaluations are light touch and board seems to have a lot of "deadwood" | Board committee in place to evaluate individual director performance jointly with director at time of re-nomination; most board members are seen as valuable contributors to organization governance | Board committee in place to evaluate individual director performance periodically and jointly discusses how to help a director give his/her best to the organization; little collective tolerance for directors who are not active in organization governance and support | |
| **Developing a plan for improving board performance over time** | Board discussion of its own performance is very limited and largely unstructured | Informal process for evaluating board performance is largely CEO/chair driven and plan for improvement is not widely known by directors | Board organizes to review performance every several years; board leadership generally seen to have a plan for improving performance | Formal process (e.g., annual self assessment) results in a clear plan for improvement; board collectively owns the topic of improving its value to the organization | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

## SECTION 2: PERCEIVED IMPORTANCE OF RESPONSIBILITIES FOR THE NEXT 1-2 YEARS

A nonprofit board adds value by undertaking each of the nine responsibilities identified; however, boards rarely have time to focus on all the responsibilities. Good nonprofits prioritize their activities depending the context of the organization.  As you complete this section please choose those areas of potential board focus that are most needed over the next 1 to 2 years to ensure the organization succeeds against its mission.

| How important is it for your board to focus on: | Low | Medium | High |
| --- | --- | --- | --- |
| Clarifying the organization's mission or vision | | ☐ | ☐ |
| Resolving key strategic or policy issues (please identify issues below) | ☐ | ☐ | ☐ |
| Developing  (or replacing) the CEO | ☐ | ☐ | ☐ |
| Developing the financial resources needed to support the strategy | ☐ | ☐ | ☐ |
| Providing expertise or access to support organizational priorities (please identify priorities below) | ☐ | ☐ | ☐ |
| Building/enhancing reputation of organization with key stakeholders/community (please identify stakeholders/community targets below) | ☐ | ☐ | ☐ |
| Overseeing financial performance and ensuring adequate risk management | ☐ | ☐ | ☐ |
| Assessing performance against mission and key program priorities | ☐ | ☐ | ☐ |
| Improving board performance | ☐ | ☐ | ☐ |

**Please add any additional thoughts to explain your answers or identify additional needs:**

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## SECTION 3: ENABLERS OF BOARD EFFECTIVENESS

McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM

| Size and structure | 1 Poor | 2 Average | 3 Good | 4 Distinctive | Comments |
|---|---|---|---|---|---|
| **Board size** | Board either too small, creating heavy work for volunteer members or inadequate coverage of key responsibilities, or too large to form cohesive group; board has not addressed size as issue to be resolved | Board size is largely legacy of past decisions; imbalances exist in workload and/or coverage of board roles. | While not a topic of discussion, board size for most part adequately meets the board's needs | Board discusses issue of size explicitly and directors widely believe the current size adequately balances:<br>▪ Coverage of roles<br>▪ Cohesiveness among members<br>▪ Work load | |
| **Executive committee (if it exists)** | Executive committee acts as de-facto board, which tends to demoralize other board members | Executive committee exists although role is not clearly understood by all board members; emerging sense that executive committee may overstep its appropriate bounds | Executive committee has clear role, well understood and supported by all board members; value of executive committee as resource not completely exploited by the organization | Executive committee has clear role, well understood and supported by all board members; serves as a valuable resource to the board chair and CEO in guiding the organization and also in improving the overall board performance | |
| **Committee structure: Purpose and charter of committees** | Committee structure mirrors staff functions and not organizational priorities; charter unclear or indistinguishable from staff functions | Committees are logically organized and reflect organizational priorities but few have clear charter/goals | Most standing committees have clear charter and reflect organizational priorities with few exceptions | Committee structure explicitly designed with clear charter around organizational priorities; board effectively uses mix of ad-hoc and standing committees to fulfill objectives | |
| **Mechanisms for affiliation with organization other than governance board membership** | Non-board mechanisms to increase affiliation with organization have not been considered, although some members see potential benefits | Organization has non-governance board affiliation options but there is considerable role confusion or options do not seem to achieve desired objectives | Mechanisms in place but effectiveness or coverage of key constituencies varies | Board has effective structures/mechanisms for affiliation such as advisory groups with well-defined roles or, such options have been considered and rejected as not necessary | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

## SECTION 3: ENABLERS OF BOARD EFFECTIVENESS

| Composition | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Understanding of board composition needed to meet organizational goals** | There is little discussion of desired board member skills/attributes; as a result board composition seems to be a legacy of random conversations/initiatives | Needs discussed are largely about how we can get more large donors. Significant gaps exist in skills needed by board | IThe process of identifying board needs is not as strong as it could be, but for the most part few gaps exist | Systematic process for identifying needed board skills driven by strategic plan; gaps are understood and agreed to by the entire board; most new board members seem to "fit our needs well" | |
| **Process and criteria for recruitment** | Recruitment process is ad-hoc; Board is largely reactive to the suggestions of a few board members/CEO | Formal process exists to identify and cultivate potential members. Candidate pool is generally seen as more narrow and a sense exists that other boards in area attract a stronger pool of directors | Formal recruitment process with clear criteria in place; Board seems to surface a strong list of potential candidates, but converts on a smaller percentage than it would like | Formal process with clear evaluative criteria in place; whole board reaches out to potential members from a wide range sources; recruitment process is continuous and with multi-year horizon; new members are seen as great additions to the board | |
| **Diversity on the board** | Diversity not a topic of conversation and no material representation of potentially useful sources of diversity | Board's view of diversity not tailored to the needs of the organization and board has not achieved the desired composition | Board understands the types of diversity needed, has a plan to achieve the desired diversity and is on its way to fulfilling it | Board understands types of diversity needed for organization and the value of diversity; current diversity on the board adequately reflects the diversity needed | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

| Composition | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Term limits** | No clear policy on term limits exists | Term limits policy exists, but the board tends to reappoint current members until term limits are reached | Although term limits works for the most part, exceptions exist, tilting to either the need for new members or the desire to retain a few exceptional long-standing members. Exiting directors are frequently "lost" to the organization | Term limits effectively balance:<br>▪ Need for new members/skills<br>▪ Retention of valuable directors<br>Mechanisms are in place for ensuring continued involvement of high-performing retiring board members | |
| **Orientation of new members** | No formal orientation for new board members | Formal orientation exists but misses key topics; new directors feel welcomed, but take a while to get up to speed | Effective formal orientation covers key topics, but misses the opportunity to welcome/listen to new directors. Initial new director roles sometimes don't make sense/inspire new members | Formal orientation process covers key topics (mission, organization, finances, responsibilities of directors); committee assignments are welcomed by new directors who quickly become effective members of the board | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

**SECTION 3:  ENABLERS OF BOARD EFFECTIVENESS**

| Leadership (board chair and committee leaders) | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Process for deciding who leads and for how long** | No clear process exists for selecting the leadership and/or most members do not know the selection process | Process exists for selecting/transitioning board and committee leadership; Some confusion within board about process or election criteria or leadership tenures | Process exists for selecting leadership at board and committee levels although leadership criteria not articulated. Expected duration of leadership positions not articulated | Clear, well-understood, and accepted process is in place to select and transition board and committee leadership. Board leadership decisions seen to strengthen performance of institution | |
| **Succession planning and development of board leaders** | No process (formal or informal) in place to cultivate next generation of board leaders | Next generation of leaders has yet to be identified by current leaders. Succession decisions result in need for much learning on the job | Future leaders are identified and given opportunities to lead.  Most transitions are seen as appropriate and timely | Process in place to identify and develop board leaders; committee assignments rotated to give board members experience and opportunity to lead; board seen to have a rich set of future leaders | |
| **Quality of leadership relationship with CEO/ key staff** | Leadership working relationship with the CEO is strained | Board chair has a good relationship with CEO though relationships with staff are under-developed; committee leaders do not interact with CEO or staff very often or effectively | The board chair has an effective relationship with the CEO and key staff although at the committee level, the quality of relationship varies | Board leadership has an effective working relationship with the CEO and key staff | |
| **Effectiveness of board leadership** | Current board leadership is largely ineffective given the needs of the organization | Current effectiveness of board leadership group (chair, committee chairs) is mixed, due to varying degrees of skill and enthusiasm | For the most part, board leadership is effective with a few exceptions | Current board leadership has the necessary skills, enthusiasm, energy, and time to provide leadership to the board | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

### SECTION 3:  ENABLERS OF BOARD EFFECTIVENESS

| Processes | 1<br>Poor | 2<br>Average | 3<br>Good | 4<br>Distinctive | Comments |
|---|---|---|---|---|---|
| **Quality of preparation** | Calendar of meetings for the year and agenda for individual meetings not established in timely manner; Board receives materials during meetings | Calendar of meetings established although anticipated content not included; Board receives agenda and some materials ahead of meeting; Materials not of appropriate quality for board to prepare; Additional meeting time required to get board up to speed | Board receives agenda and meeting materials for individual meetings in a timely manner; Annual calendar allows appropriate time for previewing/ consideration of key decisions | Calendar of meetings set and distributed for the year; agenda for the individual meetings sent out ahead of time with indication of expected focus/ high impact areas for board consideration; board receives quality background materials well in advance of meetings and arrive prepared | |
| **Effective meeting processes** | Meetings often start late and run long; Majority of time spend on presentations to board without sufficient time for board debate and discussion | Meetings start and end on time although structure of agenda revolves around CEO/staff 'show and tell'; Significant board debate on issues not expected or desired | Significant amount of agenda is CEO/staff 'show and tell'; Board has some time to debate but discussion is often cut short due to time constraints. Some members do not contribute, although they could | Meetings start and end on time and time is managed to ensure board discussion on all important topics; minimal 'show and tell' by the CEO/staff; most time dedicated to board discussion and debate on important issues.  Board members feel involved and their contributions valued | |
| **Fun and Passion** | Board views meetings as a chore; board members do not socialize before or after the meetings | Board meetings are for the most part work driven and lack opportunities for camaraderie building and connecting to the mission; Members don't mind having to miss a meeting now and then | Board meetings are for the most part productive and fun; some attempts are made to include activities to build camaraderie and connect board members with the mission; attendance is typically high | Board interactions are productive and enjoyable; good mixture of work and fun activities including effective efforts to connect board members to the mission  (e.g., site visits); board members hate to miss meetings | |

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**McKINSEY & COMPANY NONPROFIT BOARD SELF ASSESSMENT TOOL – LONG FORM**

**OTHER COMMENTS:**

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# Strengthening Connections with Culture & Traditional Values in the Aboriginal Non-profit Workplace

*A Self-Reflection Guide for Aboriginal Non-Profits*



**Developed as part of the Aboriginal Non-Profit Sector**

**Workforce and Human Resources Strategy**

**– Updated Version. Original developed by: Victoria Native Friendship Centre Project Team**

September 2016

**Draft v 2.0**

**Appendix B: ANP Self-Reflection Guide for Strengthening Connections with Culture and Traditional Values in the Aboriginal Non-profit Workplace**

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# Strengthening Connections with Culture and Traditional Values in the Aboriginal Non-profit Workplace

## About this tool

This self-reflection guide was developed by (and for) BC's Aboriginal non-profit (ANP) sector.  It was created in 2013 following a series of interviews, surveys and facilitated sessions with employees and volunteers from the sector across the province.  Elders and Youth also contributed to the development of this guide. The tool was later revised in 2017 as part of the anpBC Strategy (Phase 2). The main change was to replace the quantitative numbers-based assessment scale with a more qualitative, progress based scale.

This tool is a starting point for Aboriginal non-profit organizations who wish to make culture more a part of their workplace. It is a collection of sample examples where Aboriginal culture and traditional values are reflected in the workplace and in the human resources policies of organizations.

Those who shaped this document shared examples that were meaningful to them. In addition to specific examples of cultural practices, this tool incorporates values or "ways of being," since culture is "about who we are, not what we do."

## Why use this tool

Research has shown that employees in the ANP sector are more satisfied and likely to work for, and remain employees of, organizations which have culture in the workplace.  Given the importance of attracting and retaining good, qualified staff, this tool can be used by organizations to help raise employee morale and create a greater sense of purpose and well-being.  It can also be used in program management and evaluation of grant applications to illustrate how culture is expressed and used in your organization to create positive outcomes.

## How to use this tool

This tool is a guide to identify areas of strength and opportunities. It should not be seen as a measurement of success or failure.  The value and applicability of this tool's criteria will vary in different organizations; you may be doing only one or two of the examples shared in each of the categories and still rank yourself highly.

## Scale

This scale is designed to help you self-reflect on how your organization is doing in each category. BC Aboriginal non-profit organizations can add or remove practices to make the tool appropriate to their circumstances. This guide is a living document.  If you have suggestions for improving the document, please contact the BC Association of Aboriginal Friendship Centres (BCAAFC). We are all stronger when we collaborate and work together!

| Rating System |
| --- |
| We are doing well in this area |
| We have started doing some of this |
| We haven't thought about this yet |
| **N/A** Not applicable/insufficient info |
| We are doing well in this area |
| We have started doing some of this |

## Categories – Cultural Practices

| 1) Protocols and Traditional Practices in the Workplace | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

"Meetings are opened and closed respectfully, with a welcoming environment and practices."
*ANP sector employee*

**Examples to help you determine your level of integration in this category:**

- Acknowledgement of local territory, clans and nations
- Acknowledgement of those present and of their ancestors
- Opening and closing prayers
- Safe talking circles
- Youth involvement
- Traditional foods are served
- Gifting takes place
- Prayer honorariums
- Witnessing takes place
- 

- Drums and drumming
- Sweat lodges/cleansing takes place
- Sweeping rooms or smudging with cedar, sage, sweet grass
- Brushing off
- Pipe ceremony, offering tobacco
- Traditional language spoken at meetings
- Use of talking sticks, feathers, rock
- Staff show gratitude and give thanks
- Sashes, traditional art is displayed
- Spirituality

**Notes & Suggestions:**

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| 2) Elder Involvement | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

*Our agency looks to Elders and community members for guidance and direction. We participate in prayer together and share in teachings together, honouring where we all come from. ANP sector employee*

**Examples to help you determine your level of integration in this category**

- Elders teachings
- Elders are available to staff as counsellors, cultural advisors and mediators
- Elders consulted in program development and implementation
- New offices blessed by Elders
- Elders, grandmothers and grandfathers are included in meetings
- Elders are included in committees, boards, human resources and staff and executive meetings

- Elders are given opportunities to share stories about the past
- Elders are accommodated to ensure they are comfortable, there are frequent breaks, decaf coffee is available, served food first, etc.
- Elders not asked to heal others if still dealing with their own emotional challenges

**Notes & Suggestions:**

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| 3) Culture-Based Human Resources and Employee Benefits | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

**Examples to help you determine your level of integration in this category:**

- Employees can adjust their schedules to reflect cultural practices
- Employees can request time off for cultural leave (harvesting, fish canning, funerals, etc.)
- Cultural leave is paid
- There is a formal documented policy for cultural leave
- National Aboriginal Day recognized as statutory holiday, celebrated
- Employees can take time off to attend cultural conferences, rallies, demonstrations (e.g. ANP Workforce & Human Resources Strategy workshops, Idle No More)
- Cultural liaison on staff
- Hiring practices include importance of culture in organization
- Bereavement leave 5 days/year
- Bereavement leaves includes extended family (aunts, uncles, cousins, etc.)

**Notes & Suggestions:**

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| 4) Events and Gatherings | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

**Examples to help you determine your level of integration in this category:**

- Sharing meals and eating together regularly, and using this time to share cultural teachings in an inclusive way
- Elder gatherings are held
- Community feasts to share information and build relationships/ Potlatches
- Traditional food is served (e.g. Bannock, moose, venison, smoked salmon, fish head soup, etc.); leftovers sent home with Elders, families
- Blessing food, thanking cooks and helpers
- Traditional activities (singing, music, dancing, and story-telling) are part of gatherings
- Dance groups evenings, pow wow, round dance, etc.

- Traditional events (naming and coming of age ceremonies and other milestones) are celebrated
- Community members are invited to be a part of the planning process
- Participation in/teaching of traditional Fishing/Hunting/Gathering (root digging, berry picking)
- Sweat lodges/cleansing takes place
- Medicine gatherings
- Sun dance, mask dance
- First salmon ceremony, first spring burning
- Activities outdoors

**Notes & Suggestions:**

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| 5) Cultural Teaching and Training - Understanding the Past and How it Shapes the Present | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

*I think for me the philosophy of the First Nations Code of Ethics are embedded in our practice. We are both housing and health and as such require all staff to understand Cultural Competency. As a Society we strive to ensure that Holistic practices are represented in all aspects of our service and organization.*
ANP sector employee

**Examples to help you determine your level of integration in this category:**

- Cultural workshops such as drumming, drum making, weaving (basket making/cedar hats), beading, etc.
- Cultural advisors and Elders are available in the workplace
- Culturally knowledgeable individuals are valued and supported
- Access to language programs or ability to work in the Indigenous language

- There is a cultural committee
- Cultural teachings are routinely shared
- Cultural competency training is available to employees, including history of colonialism, residential schools and related abuses
- Teachers are well-versed in culture
- Cultural artifact making such as medicine pouch, dream catcher, etc.



**Notes & Suggestions:**

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| 6) Wellness, Support, and Self-Care | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

*Meaningful role for an Elder to be part of programs. Taking care of one another: if a staff member is facing a personal struggle, there is the recognition of our humanness and other staff provide support. There is financial support available from employer for counseling or other creative supports.* ANP sector employee

**Examples to help you determine your level of integration in this category:**

- The members of a workplace treat each other as a family, not just as co-workers
- Workplace promotes self-care and balance, holistic view
- Individuals are treated as whole person and supported in their development
- Employees can request time off to participate in treatment programs

- Practice respect, honesty, understanding and openness
- Culture is foundation of treatment programs
- Staff support each other during times of personal struggle
- Grief and loss supports - staff come together as a group, smudging/crushing, sweating, etc.
- Workplace includes Elders, Youth, families, and parents



**Notes & Suggestions:**

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| 7) Organizational Structure and Conflict Resolution | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

*The reason I continue working in ANP agencies is because I feel safe; if that's culturally, emotionally, spiritually.*  ANP sector volunteer

**Examples to help you determine your level of integration in this category:**

- Interlocking circles with shared responsibility and open communication instead of a hierarchical pyramid with bosses and top-down communication
- Clarity of purpose and expectations for different circles: work updates and planning; sharing; healing; "round table"
- Important large meetings are based on Long House/Big House model instead of Board meeting model

- Elders are involved in resolving conflict
- Ensure all voices of staff are heard
- Team-based approach to problem solving
- No gossiping – dealing with it in person
- Healing circles
- Restorative justice principles embodied
- Conflict resolution viewed as opportunity for growth
- Open and inclusive approach



**Notes & Suggestions:**

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| 8) Youth Involvement and Development | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

**Examples to help you determine your level of integration in this category:**

- Teaching and empowering Youth
- Youth involved in the organization (e.g. Youth board members, etc.)
- Coaching Youth and providing volunteer and work experiences
- Programs dedicated to supporting Youth development

- Employees given space to deal with situations involving their children
- Youth consulted in program development and implementation
- Youth included in committee, board, meetings

**Notes & Suggestions:**

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| 9) Workplace Environment | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

**Examples to help you determine your level of integration in this category:**

- Workplace is treated like a community or extended family, and a part of the larger Aboriginal community
- Importance of family recognized and given strong priority
- Time and space is provided for people to bring culture in the workplace
- Cultural art and artifacts in workplace
- Culture practiced daily working with Aboriginal clients
- There is a cultural suite – a room dedicated to culture with special objects, teachings, etc.

- Elder's room or space
- Working together, helping each other finish projects
- Family are allowed to visit workplace (when appropriate)
- Artists invited into offices to sell their goods
- Using Native language
- Laughing, quality time in/out workplace
- Delivering programs and services in a good way following tradition and culture

**Notes & Suggestions:**

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| 10) Organizational Practices to Implement Culture | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a: not applicable insufficient info |
|---|---|---|---|---|
| | | | | |

**Examples to help you determine your level of integration in this category:**

- Culture is part of organization's mission statement, constitution, strategic plan
- There is acknowledgement of location on cultural practices and events
- There are opportunities for staff to share culture; culture is staff-led
- Leadership supports practicing culture and is accommodating
- Culture is a priority even when the delivery of services is contracted out
- Cultural practices are inclusive
- Workflow planning is based on seasons and traditional calendar

- Acknowledgement of the power of words and the challenges of translation
- Recognition that culture is personal and private and cannot be imposed
- Use social media to promote cultural events
- Respect for all First Nations represented in the organization
- Traditional concepts of time; includes "down time" and time for unexpected personal challenges
- Include culture in research work

**Notes & Suggestions:**

_____

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_____

## Bringing It All Together

To track how much culture is rooted in your workplace, add up all the scores from each category.

| Area | We haven't thought about this yet | We have started doing some of this | We are doing well in this area | n/a |
|------|------|------|------|------|
| 1)  Protocols and Traditional Practices in the Workplace | | | | |
| 2)  Elder Involvement | | | | |
| 3)  Culture-Based Human Resources and Employee Benefits | | | | |
| 4)  Events and Gatherings | | | | |
| 5)  Cultural Teaching and Training - Understanding the Past and How it Shapes the Present | | | | |
| 6)  Wellness, Support, and Self-Care | | | | |
| 7)  Organizational Structure and  Conflict Resolution | | | | |
| 8)  Youth Involvement and Development | | | | |
| 9)  Workplace Environment | | | | |
| 10) Organizational Practices to Implement Culture | | | | |
| **Total (out of 50):** | | | | |

## How We're Doing as an Organization

Tracking your findings over time will help you determine how your organization is doing in terms of culture in the workplace. In how many categories did you select "doing well in this area"? If your overall self-reflection reflects a relatively low level of cultural practices and values in your workplace, you may want to involve your team in developing an approach to more fully embed culture in your workplace. You can also reach out to individuals or organizations with experience in doing this. Conversely, if you have high level of culture in the workplace, you may want to mentor others who may benefit from your guidance and experience.

In either case, by going through this process you have probably discovered new ways to help you integrate culture and values in your workplace. As a staff or through a cultural community, you can develop a plan of action to help move your organization in the direction which best reflects your objectives about how culture and traditional values should be reflected in your workplace.

| Scale to help you gage how much Culture is rooted in your Organization | | | |
|---|---|---|---|
| **Maximum total out of 50** | 0-10 | Low | Significant effort and great opportunities for improvement |
| | 11-25 | Moderate | Considerable effort and great opportunities for improvement |
| | 26-39 | High | Some effort required and key opportunities for improvement |
| | 40-50 | Very High | Small effort required and opportunities for improvement |

## Moving Forward

Tracking your findings over time will help you determine how your organization is doing in terms of culture in the workplace. In how many categories did you select "doing well in this area"? If your overall self-reflection reflects a relatively low level of cultural practices and values in your workplace, you may want to involve your team in developing an approach to more fully embed culture in your workplace. You can also reach out to individuals or organizations with experience in doing this. Conversely, if you have high level of culture in the workplace, you may want to mentor others who may benefit from your guidance and experience.

In either case, by going through this process you have probably discovered new ways to help you integrate culture and values in your workplace. As a staff or through a cultural community, you can develop a plan of action to help move your organization in the direction which best reflects your objectives about how culture and traditional values should be reflected in your workplace.

**Culture Action Plan Sample Template**

A plan of action includes steps your organization will take to accomplish a goal or specific action. It involves identifying:

1. What you want to do, and why
2. Who is going to do it, and by when
3. Guidance or directions for those responsible

**Example:**

| | Category Name: Elder Involvement | | | | |
|---|---|---|---|---|---|
| | **Category Rating:  2/5** | | | | |
| | | | | | |
| **#** | **Action to take** | **Rationale / Reason** | **Individual(s) Responsible** | **Due Date** | **Notes** |
| **1.** | Ask local Elder to sit on our Board | Ensure Elder wisdom at the table | Jenny | By March 31 | Steve knows an Elder who has experience in Aboriginal non-profits who may be available |
| **2.** | Ask volunteer Elder to assist in cultural training, if available and willing to do so | Ensure all staff share cultural sensitivity | Roger | February 28 | Cultural training workshop happens the first Monday of every month |

These are a few examples of specific actions that can be included in a plan of action to bring your organization to a cultural place that is right for you.

A few key points to keep in mind (based on advice from employees in the sector):
- Involving all staff is essential
- The leadership and support of decision makers is extremely important
- Forming a cultural committee or group to move this along helps
- Culture in an organization starts with the territory the organization is located on, and then broadens to reflect the cultures of the individuals who are part of the organization
- Putting cultural practices into policy can be very valuable
- Everyone should be free to participate (or not) in the manner that feels right to them
- Elders and traditional knowledge holders are keys to success

**Final Remarks**

The tool should be used with flexibility to suit your organization's structure, objectives, goals, and unique circumstances to help you craft a plan to strengthen connections with culture and traditional values in your workplace. Elders, knowledge holders, leaders and Youth can assist staff in this process. Staff in other Aboriginal non-profits may be a resource to you as well.

It is with our deepest respect that we give thanks to all who serve in the Aboriginal non-profit sector. With your insight and willingness to envision a future for generations to pursue careers in the Aboriginal non-profit sector, we were able to develop a tool to assist in strengthening culture and traditional values in the workplace.

**Appendix C: Culture and Wellness Self-Reflection Tool**


## Culture and Wellness Self-Reflection

| Organization | |
|---|---|


## ASSESS

**Step 1:**    Please click 'Yes' or 'No' for each question.
**Step 2:**    Count the number of 'Yes' responses in each category and enter that number in the Total column.

| | PHYSICAL | Yes | No | Total 'Yes' |
|---|---|---|---|---|
| Q1 | I get enough sleep so I feel well rested and ready for work each day | ○ | ○ | |
| Q2 | I DO NOT have any health conditions that negatively impact my well-being | ○ | ○ | |
| Q3 | I do moderate activity 4 times a week for 30 minutes or more | ○ | ○ | |
| Q4 | I can meet my basic needs for food, shelter and transportation on my household | ○ | ○ | |
| Q5 | I avoid drugs, alcohol and tobacco | ○ | ○ | |

| | SPIRITUAL | Yes | No | Total 'Yes' |
|---|---|---|---|---|
| Q6 | I nurture my spirit through ceremony, faith, culture, dance, meditation or other practices | ○ | ○ | |
| Q7 | I seek guidance from others / I have a circle of support when I feel challenged | ○ | ○ | |
| Q8 | I believe my life has purpose, is meaningful and has a sense of direction | ○ | ○ | |
| Q9 | I am satisfied with the amount of my participation with cultural events | ○ | ○ | |
| Q10 | I feel balanced in the mental, emotional, spiritual, and physical aspects of my life | ○ | ○ | |

| RELATIONSHIPS | | Yes | No | Total 'Yes' |
|---|---|---|---|---|
| Q11 | I feel that I belong (at home, work and within my community) | ◯ | ◯ | |
| Q12 | I have loving and healthy relationships with my family | ◯ | ◯ | |
| Q13 | I feel safe, secure, respected and loved within my family unit | ◯ | ◯ | |
| Q14 | I feel I am a valued team member of my organization | ◯ | ◯ | |
| Q15 | I am satisfied with the relationships in my life | ◯ | ◯ | |

| FINANCIAL | | Yes | No | Total 'Yes' |
|---|---|---|---|---|
| Q16 | My job and income are stable and not at risk of sudden change | ◯ | ◯ | |
| Q17 | I have enough money to live comfortably and pay all my bills every month | ◯ | ◯ | |
| Q18 | I effectively budget my income every month | ◯ | ◯ | |
| Q19 | I effectively balance my needs and my wants | ◯ | ◯ | |
| Q20 | I have healthy boundaries and do not assume other family members' financial responsibilities | ◯ | ◯ | |

| EMOTIONAL | | Yes | No | Total 'Yes' |
|---|---|---|---|---|
| Q21 | I can manage different stressors in my life | ◯ | ◯ | |
| Q22 | I use healthy methods manage my moods (such as exercise, ceremony, connecting with elders etc.) | ◯ | ◯ | |
| Q23 | I feel comfortable asking for help when I need it | ◯ | ◯ | |
| Q24 | I generally feel happy, confident and capable in most areas of my life | ◯ | ◯ | |
| Q25 | I am happy with my significant relationships | ◯ | ◯ | |

| OCCUPATION | | Yes | No | Total 'Yes' |
|---|---|---|---|---|
| Q26 | I work in a safe, respectful and nourishing environment | ◯ | ◯ | |
| Q27 | I feel I am respected and a valued part of my team | ◯ | ◯ | |
| Q28 | I feel positive about the contributions I make within my organization | ◯ | ◯ | |
| Q29 | I believe in the mission and values of my organization | ◯ | ◯ | |
| Q30 | I feel my organization supports its staff members | ◯ | ◯ | |

Culture and Wellness Self-Reflection

| If you had three wishes to improve the culture and wellness aspects of your organization what would you wish for? | |
|---|---|
| 1 | |
| 2 | |
| 3 | |

| Please use this space to include any additional comments you feel may be helpful. Please include any comments or concerns not mentioned in this assessment. |
|---|
| |

**REFLECT**

**Step 3:**    Transfer each Total number of 'Yes' responses  from page 1 and 2 into the Summary table below.

| ASSESSMENT SUMMARY | | | | | |
|---|---|---|---|---|---|
| PHYSICAL | SPIRITUAL | RELATIONSHIPS | FINANCIAL | EMOTIONAL | OCCUPATION |
| | | | | | |

Each Category is out of a possible 5. The 'Yes' responses represent your areas of strength. Don't worry if your score is not where you'd like it to be. This is just a snap shot of where you are right now. You can change your course and create the wellness you desire.

Culture and Wellness Self-Reflection

**ACT**

| After reviewing your Assessment Summary, what areas require attention? |
|---|
|  |

| What are 3 steps you could take to help create positive change in the areas requiring attention? |
|---|
| 1 |
| 2 |
| 3 |

| Can you identify 2-3 people you could approach for support to help you in making this change? |
|---|
| 1 |
| 2 |
| 3 |

| After reviewing your Assessment Summary, what areas are going well? |
|---|
|  |

| For the areas going well, share your gratitude with someone else. Share what you are grateful for and why. |
|---|
|  |

Culture and Wellness Self-Reflection

**Appendix D: Culture and Wellness Committee, Terms of Reference**

This document sets out the terms of reference of the Culture and Wellness Committee, including roles and responsibilities, conflict of interest, membership, conduct of meetings, voting and reporting.

*Roles and Responsibilities*

The role of the Culture and Wellness Committee is to...[concisely state the mandate or purpose of the committee].

Responsibilities of the committee include:

- [List the various responsibilities of the committee], such as "drafting culture and wellness policy," "liaising with organization executive," etc.

*Conflict of Interest*

[State that members are expected to avoid real or apparent conflicts of interest with their work on the committee and their own interests and the interests of their family and friends.

State what is expected if a committee member is in a conflict of interest on a specific issue, for example "declare the conflict to other committee members and recuse themselves from voting on the issue."]

*Membership*

[Include the following information:

- Number of committee members?
- Who appoints them?
- Is it a permanent committee or does it have a limited objective?
- For what period are the members appointed (for example, 2 years)
- How are members removed from the committee?
- How is the committee is disbanded?]

*Conduct of Meetings*

- [How frequently are meetings held?
- Are they formal structured meetings or ad hoc?
- How much advance notice must be given of meetings?
- How are meetings to be held (in person, teleconference, Skype, etc.)
- Who chairs meetings? How is the chair selected?

- Are members paid to attend meetings? If so, in what circumstances and how much?
- What expenses are reimbursable? (For example, mileage, meals, airfare, accommodation) ]

## *Voting*

- [What is the quorum for voting? (How many members must be present to hold a vote?)
- How is voting conducted? (Show of hands, secret ballot, etc.)
- What happens in a tie vote?
- Does the committee chair vote, or just to break a tie?]

## *Reporting*

- [Are meeting minutes recorded for all committee meetings?
- Who records the minutes?
- How soon after a meeting must the minutes be prepared?
- Are the minutes reviewed and approved at the next meeting?
- How frequently and in what form does the committee report progress to the organization?]

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**Note:** This is just some of the information that could go into a terms of reference for a committee. Think about your organization, its mandate, and committee membership and adapt it accordingly.

**Appendix E: Bingo Game**

Culture and Wellness Bingo from myfreebingocards.com

**Play**

Print off your bingo cards and start playing!

The bingo caller's card contains of all the words that appear on the cards. To play bingo, make up definitions for each word on the caller's card and have players guess the word. If they guess the correct word they can cross it off their card.

**Edit and Create**

To add more words or make changes to this set of bingo cards go to myfreebingocards.com/ or bingo-card-generator to create a new set of bingo cards.

**Have Fun!**

## Bingo Caller's Card

| Balance | Physical | Spiritual | Family | Healthy | Goals | Respectful |
|---------|----------|-----------|--------|---------|-------|------------|
| Social | Elders | Family | Support | Values | Safety | Smudge |
| Ceremony | Prayer | Adequate Funding | Job Security | Friendship | Trust | Recognition |
| Sense of Belonging | Confidence | Accountability | Fit Bit | Traditional Foods | Meditation | Connecting with Others |
| Circle of Support | Weekly Circles | Staff Retreats | Teamwork | Fun | Humour | Order |

myfreebingocards.com

## Culture and Wellness

| | | | | |
|---|---|---|---|---|
| Confidence | Fun | Circle of Support | Safety | Recognition |
| Smudge | Connecting with Others | Healthy | Physical | Traditional Foods |
| Ceremony | Prayer | FREE SPACE | Teamwork | Humour |
| Accountability | Fit Bit | Order | Trust | Job Security |
| Respectful | Friendship | Weekly Circles | Family | Meditation |

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## Culture and Wellness

| | | | | |
|---|---|---|---|---|
| Trust | Smudge | Adequate Funding | Traditional Foods | Teamwork |
| Friendship | Elders | Support | Respectful | Order |
| Connecting with Others | Recognition | FREE SPACE | Humour | Job Security |
| Goals | Accountability | Meditation | Weekly Circles | Fun |
| Family | Family | Circle of Support | Spiritual | Values |

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## Culture and Wellness

| Sense of Belonging | Respectful | Job Security | Spiritual | Prayer |
|---|---|---|---|---|
| Weekly Circles | Meditation | Support | Ceremony | Fun |
| Safety | Fit Bit | FREE SPACE | Confidence | Social |
| Healthy | Smudge | Order | Elders | Values |
| Adequate Funding | Balance | Family | Traditional Foods | Family |

## Culture and Wellness

| Teamwork | Balance | Social | Family | Respectful |
|---|---|---|---|---|
| Trust | Physical | Accountability | Values | Humour |
| Fun | Support | FREE SPACE | Recognition | Traditional Foods |
| Healthy | Weekly Circles | Adequate Funding | Family | Safety |
| Sense of Belonging | Job Security | Prayer | Smudge | Fit Bit |

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## Culture and Wellness

| Weekly Circles | Recognition | Respectful | Smudge | Ceremony |
|---|---|---|---|---|
| Adequate Funding | Balance | Prayer | Social | Connecting with Others |
| Fit Bit | Safety | FREE SPACE | Spiritual | Humour |
| Sense of Belonging | Meditation | Staff Retreats | Support | Elders |
| Trust | Values | Confidence | Family | Teamwork |

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## Culture and Wellness

| Spiritual | Values | Balance | Smudge | Healthy |
|---|---|---|---|---|
| Trust | Ceremony | Friendship | Teamwork | Prayer |
| Job Security | Humour | FREE SPACE | Confidence | Safety |
| Support | Fun | Family | Recognition | Elders |
| Respectful | Traditional Foods | Meditation | Staff Retreats | Connecting with Others |

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## Culture and Wellness

| Values | Ceremony | Physical | Accountability | Respectful |
|---|---|---|---|---|
| Traditional Foods | Confidence | Sense of Belonging | Order | Trust |
| Circle of Support | Weekly Circles | FREE SPACE | Smudge | Fun |
| Fit Bit | Meditation | Balance | Job Security | Prayer |
| Safety | Family | Adequate Funding | Friendship | Connecting with Others |

## Culture and Wellness

| Family | Healthy | Fit Bit | Values | Circle of Support |
|---|---|---|---|---|
| Smudge | Family | Trust | Teamwork | Order |
| Ceremony | Job Security | FREE SPACE | Support | Respectful |
| Humour | Sense of Belonging | Meditation | Adequate Funding | Balance |
| Safety | Prayer | Confidence | Physical | Goals |

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## Culture and Wellness

| Social | Values | Traditional Foods | Staff Retreats | Humour |
|---|---|---|---|---|
| Recognition | Physical | Accountability | Weekly Circles | Support |
| Elders | Order | FREE SPACE | Fit Bit | Smudge |
| Circle of Support | Goals | Trust | Family | Fun |
| Balance | Friendship | Spiritual | Healthy | Confidence |

## Culture and Wellness

| Friendship | Elders | Staff Retreats | Balance | Fun |
|---|---|---|---|---|
| Trust | Safety | Sense of Belonging | Spiritual | Healthy |
| Social | Job Security | FREE SPACE | Circle of Support | Support |
| Family | Teamwork | Ceremony | Recognition | Humour |
| Smudge | Confidence | Prayer | Weekly Circles | Family |

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# Culture and Wellness

| | | | | |
|---|---|---|---|---|
| Friendship | Support | Accountability | Adequate Funding | Respectful |
| Meditation | Staff Retreats | Order | Weekly Circles | Fun |
| Traditional Foods | Recognition | FREE SPACE | Sense of Belonging | Humour |
| Confidence | Balance | Connecting with Others | Trust | Job Security |
| Family | Ceremony | Healthy | Spiritual | Family |

# Culture and Wellness

| | | | | |
|---|---|---|---|---|
| Social | Prayer | Physical | Respectful | Humour |
| Ceremony | Confidence | Goals | Meditation | Recognition |
| Accountability | Support | FREE SPACE | Friendship | Connecting with Others |
| Safety | Teamwork | Healthy | Smudge | Spiritual |
| Fun | Circle of Support | Order | Values | Trust |

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## Culture and Wellness

| Ceremony | Job Security | Humour | Spiritual | Smudge |
|---|---|---|---|---|
| Traditional Foods | Connecting with Others | Balance | Elders | Physical |
| Adequate Funding | Respectful | FREE SPACE | Family | Friendship |
| Goals | Accountability | Prayer | Safety | Healthy |
| Recognition | Fun | Circle of Support | Values | Sense of Belonging |

## Culture and Wellness

| Safety | Values | Circle of Support | Accountability | Adequate Funding |
|---|---|---|---|---|
| Prayer | Trust | Weekly Circles | Sense of Belonging | Staff Retreats |
| Order | Social | FREE SPACE | Family | Recognition |
| Physical | Humour | Spiritual | Meditation | Fit Bit |
| Traditional Foods | Healthy | Connecting with Others | Job Security | Friendship |

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## Culture and Wellness

| | | | | |
|---|---|---|---|---|
| Teamwork | Humour | Adequate Funding | Fit Bit | Weekly Circles |
| Physical | Traditional Foods | Respectful | Confidence | Meditation |
| Social | Spiritual | FREE SPACE | Goals | Accountability |
| Family | Circle of Support | Job Security | Smudge | Ceremony |
| Family | Connecting with Others | Elders | Trust | Order |

## Culture and Wellness

| | | | | |
|---|---|---|---|---|
| Healthy | Confidence | Connecting with Others | Trust | Order |
| Balance | Meditation | Friendship | Recognition | Goals |
| Spiritual | Respectful | FREE SPACE | Sense of Belonging | Traditional Foods |
| Family | Elders | Weekly Circles | Family | Physical |
| Support | Teamwork | Staff Retreats | Accountability | Fun |

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## Culture and Wellness

| Teamwork | Elders | Smudge | Respectful | Meditation |
|---|---|---|---|---|
| Spiritual | Confidence | Recognition | Trust | Sense of Belonging |
| Circle of Support | Weekly Circles | FREE SPACE | Friendship | Humour |
| Prayer | Job Security | Social | Ceremony | Healthy |
| Physical | Order | Safety | Family | Support |

## Culture and Wellness

| Prayer | Safety | Fit Bit | Confidence | Teamwork |
|---|---|---|---|---|
| Staff Retreats | Recognition | Trust | Adequate Funding | Respectful |
| Spiritual | Healthy | FREE SPACE | Physical | Accountability |
| Order | Job Security | Elders | Friendship | Fun |
| Meditation | Sense of Belonging | Values | Family | Goals |

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## Culture and Wellness

| | | | | |
|---|---|---|---|---|
| Adequate Funding | Social | Ceremony | Spiritual | Family |
| Smudge | Respectful | Support | Connecting with Others | Staff Retreats |
| Sense of Belonging | Values | FREE SPACE | Goals | Trust |
| Physical | Fit Bit | Teamwork | Accountability | Fun |
| Circle of Support | Humour | Safety | Friendship | Order |

## Culture and Wellness

| | | | | |
|---|---|---|---|---|
| Social | Family | Balance | Adequate Funding | Fun |
| Recognition | Traditional Foods | Fit Bit | Values | Teamwork |
| Order | Spiritual | FREE SPACE | Connecting with Others | Smudge |
| Goals | Confidence | Friendship | Circle of Support | Healthy |
| Humour | Accountability | Job Security | Elders | Prayer |

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## Culture and Wellness

| Values | Fun | Healthy | Balance | Family |
|---|---|---|---|---|
| Prayer | Safety | Adequate Funding | Spiritual | Trust |
| Elders | Physical | FREE SPACE | Accountability | Friendship |
| Sense of Belonging | Traditional Foods | Support | Connecting with Others | Smudge |
| Family | Weekly Circles | Circle of Support | Meditation | Recognition |

## Culture and Wellness

| Prayer | Confidence | Order | Recognition | Spiritual |
|---|---|---|---|---|
| Adequate Funding | Humour | Family | Circle of Support | Traditional Foods |
| Social | Respectful | FREE SPACE | Connecting with Others | Physical |
| Smudge | Balance | Meditation | Fit Bit | Trust |
| Friendship | Family | Accountability | Teamwork | Values |

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## Culture and Wellness

| Weekly Circles | Confidence | Goals | Balance | Trust |
|---|---|---|---|---|
| Order | Fit Bit | Healthy | Connecting with Others | Meditation |
| Job Security | Values | FREE SPACE | Respectful | Family |
| Social | Smudge | Traditional Foods | Humour | Physical |
| Staff Retreats | Safety | Support | Adequate Funding | Recognition |

## Culture and Wellness

| Accountability | Prayer | Smudge | Respectful | Healthy |
|---|---|---|---|---|
| Physical | Family | Friendship | Support | Sense of Belonging |
| Family | Meditation | FREE SPACE | Fun | Trust |
| Humour | Balance | Staff Retreats | Elders | Adequate Funding |
| Recognition | Safety | Goals | Traditional Foods | Job Security |

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**Appendix F: Sample Pet Policy**

**Example 1**

<div align="center">

Name of Your ANP

Contract and Release

</div>

| GENERAL INFORMATION |
| --- |
| **Employee Name:**                                    **Date:**<br><br><br><br>**Anticipated Number of Days (per month) dog will be present in the work place:** |

| DOG DESCRIPTION |
| --- |
| **Breed:**                        **Weight:**                **Age:** |

| Documentation required | Date received | Date to be reviewed |
| --- | --- | --- |
| **Record of vaccinations** | | |
| **Copy of insurance** | | |

**Medical Information:**

The owner of the dog agrees to provide copies of all pertinent pet medical information to their manager, to be kept in their personnel file, and agrees to the following minimum requirements.

- All vaccinations, including bordetellosis, are complete and current.
- Parasite control is being done on a routine basis and the animal is free of ticks and fleas.
- The dog has no contagious disease or ringworm.

**<u>Guidelines:</u>**

The owner of the dog agrees to observe the following guidelines.  Authorization is granted at the sole discretion of Name of Your ANP and can be revoked at any time.

11) Owner will keep the dog out of food prep and eating areas at all times.

12) Dogs are not permitted in sharing circles, during guest speaker presentations or during team building activities.

13) Owner will provide Name of Your ANP with a copy of his or her home insurance policy that includes their pet in the coverage.

14) Owner will immediately clean up any accidents or messes using appropriate clean-up and disinfectant measures.

15) Owner **will not** bring to work a dog that has not been fully house trained.

16) Owner **will not** bring a dog to work that is ill or behaving differently from the dog's normal behavior and will remove the dog from the premises if it becomes ill while on Name of Your ANP property.

17) Owner **will not** bring a dog to work that has bitten or is aggressive, destructive, or excessively vocal.

18) Owner must control the dog at all times using a leash or by voice command while the dog is in the work place.

19) Owner has sole responsibility for care and control of the dog while on Name of Your ANP Property.

20) Owner must keep a supply of plastic bags with ties at all times and is responsible for the appropriate disposal of dog waste.

*If the owner is unable to follow the guidelines indicated above, they may be asked by their manager to refrain from bringing their dog to the work place.

**Waiver of Liability:**

In consideration of being permitted to bring ones dog to the work place, the dog owner does hereby unconditionally releases, indemnifies, waives, discharges and agrees to hold harmless Name of Your ANP staff and guests from any loss, damage, liability and expense, including court costs and attorney fees, that may be incurred as a result of injuries, including death to persons or dogs, or damage to property, directly or indirectly associated with the owner bringing his/her dog to the work place, whether caused by the negligence of other staff,  clients,  and visitors

BY SIGNING THIS AUTHORIZATION AND RELEASE, THE DOG OWNER EXPRESSLY ACKNOWLEDGES AND REPRESENTS that he/she has carefully read the foregoing terms and conditions, understands the contents thereof and signs voluntarily; he/she is at least eighteen (18) years of age and fully competent; and executes this Authorization and Release intending that he/she, his/her spouse and family members, and his/her heirs, assigns and personal representatives if deceased, be legally bound by same.

_____          _____

NAME                                                                                                      DATE

**Approval of the Manager:**

I have discussed the foregoing Authorization and Release with the dog owner and am agreeable to the employee bringing his or her dog to the workplace.  I approve this request, subject to employee following these guidelines and demonstrating responsible dog ownership.

_____          _____

NAME                                                                                                      DATE

## Example 2 (Animal/Pet Policy)

**Name of ANP**                                        **Date:**

### 1. PREAMBLE

While the *Name of Your ANP* recognizes the human-animal bond is a mutually beneficial and dynamic relationship between people and animals that positively influences the health and well-being of both. It also recognizes the need to minimize the potential health and safety risks to clients, participants and employees that may result from the presence of other animals / pets at the *Name of Your ANP*.

### 2. POLICY

(a) Where applicable, the animal/pet should be licensed, vaccinated and have I.D. tags

(b) If the animal/pet causes a disturbance, interrupts the work of others, or poses a health or safety risk to clients, participants, or staffs who are exposed to it, the animal/pet must immediately be removed from the *Name of Your ANP* by its owner.

(c) By bringing a pet onto the *Name of Your ANP* property, the owner accepts sole financial and legal responsibility for any damage, injury or other harm caused by the animal / pet and will indemnify the *Name of Your ANP* should it be found legally liable for any injury or other harm caused by the animal / pet.

(d) No animals or pets are permitted at the Wellness Centre or Childcare Centre while there are children or clients present.

(e) No animals or pets are permitted in the foyer, meeting spaces or the gym /Hall at the Main Building while there are children and clients present.

(f) Employees who bring their animals /pets to work are encouraged to keep them with them in their designated work space and must ensure they are abiding by the guidelines mention above (a) to (f).

_____          _____

Employee Name                                              Employee Address

_____          _____

Employee Signature                                         Date

Your City By-Laws

1. Any dog over the age of six months must have a valid license for the current calendar year. Your Dog License must be purchased at the City Hall.  See the Fees and Charges for Animal Control and Licensing to determine how much your license will cost.

2. Dogs in public places must be kept on a leash, chain or tether not exceeding 183 cm (6 ft) in length and under the immediate care and control of a competent person.

3. If you lose your dog's license tag a replacement license tag may be obtained up satisfying the City that the original license tag has been lost or stolen and upon payment of the replacement license fee.

4. If your animal defecates on a highway or public place, the person having care, custody, or control of the animal shall immediately remove the excrement and dispose of it in a sanitary manner.


**DOG INFORMATION**

Name: _____

Address: _____

Postal Code: _____

Phone/Cell (pls. indicate) #:_____

Dog's Name: _____

Breed: _____

Colour: _____

Sex: _____ Tag or Tattoo # _____

**Appendix G: Cultural Policies**

Policy

# Directive: compliance is mandatory

Cultural Leave Policy Directive – Special Leave with Pay
for Aboriginal and Torres Strait Islander Employees

**Policy developed by:** Workforce Division
**Approved at Portfolio Executive on:** 28 September 2011
**Next review due:** 28 September 2014

| | |
|---|---|
| **Summary** | The purpose of the Cultural Leave Policy Directive is to specifically address the cultural needs of Aboriginal and Torres Strait Islander employees by facilitating access to provisions designed to assist these employees to attend to cultural obligations and activities outside the workplace. |
| | Accordingly, SA Health has implemented a separately defined (supplementary) Special Leave with Pay category (Cultural Leave) to enable Aboriginal and Torres Strait Islander employees to meet their cultural obligations and to participate in national cultural activities without, as far as practicable, incurring a loss of remuneration in the short term. |
| | Subject to approval, a maximum of 15 days per service year may be accessed by Aboriginal and Torres Strait Islander employees for the purposes of Cultural Leave. The entitlement to Cultural Leave, Special Leave with Pay is incorporated within (and is not in addition to) existing Special Leave with Pay provisions for SA Health employees. |
| **Keywords** | Aboriginal, Torres Strait Islander, Cultural Leave, Special Leave with Pay, cultural obligations, Family – extended Family, NAIDOC, NAIDOC week, National Sorry Day, Directive |
| **Policy history** | Is this a new policy? **Yes**<br>Does this policy amend or update an existing policy? **No**<br>Does this policy replace an existing policy? **No** |
| **Applies to** | All SA Health Portfolio |
| **Staff impact** | SA Health Aboriginal and Torres Strait Islander employees |
| **PDS reference** | D0246 |

## Version control and change history

| Version | Date from | Date to | Amendment |
|---------|-----------|---------|-----------|
| 1.0 | 28/09/2011 | Current | Original version |
| | | | |
| | | | |
| | | | |

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# Cultural Leave Policy:

# Special Leave with Pay for Aboriginal and Torres Strait Islander Employees

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## SA Health Cultural Leave Policy – Special Leave with Pay for Aboriginal and Torres Strait Islander Employees

### 1.  Policy Commitment

SA Health recognises and values the cultural diversity of its workforce and acknowledges the importance of cultural obligations and the ability to participate in cultural activities to Aboriginal and Torres Strait Islander employees. SA Health is committed to enabling Aboriginal and Torres Strait Islander employees to participate in cultural activities and to meet their cultural obligations in instances where individual needs and obligations need to be met and conducted within working hours.

SA Health's commitment extends to providing specific and defined special leave provisions to Aboriginal and Torres Strait Islander employees, including the ability to access existing special leave with pay entitlements for recognised cultural purposes. SA Health has developed this Policy document to direct the implementation and application of special leave with pay entitlements for Aboriginal and Torres Strait Islander employees across SA Health.

The Policy aligns with and supports SA Health's commitment to increasing the employment of Aboriginal and Torres Strait Islanders peoples at all levels within SA Health's workforce, including improving the attraction and retention of current and future Aboriginal and Torres Strait Islander employees across the Portfolio.

### 2.  Scope

The Policy covers all Aboriginal and Torres Strait Islander persons employed by SA Health.

### 3.  Context

Special Leave with Pay is designed to enable employees to meet individual needs and responsibilities that cannot be attended to outside of normal working hours and in instances where other leave entitlements are not available or appropriate.

Subject to approval, existing Special Leave with Pay provisions allow employee access to paid entitlements of up to a maximum of 15 days per service year.

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The Policy is to be considered within the context of, and having regard to existing paid leave entitlements and provisions available to SA Health employees, including those specified within the SA Health Care Act Human Resources Manual and the Commissioner for Public Employment's Commissioner's Standards/Determinations as appropriate. Cultural Leave Special Leave with Pay entitlements are to be used in conjunction with existing Special Leave with Pay entitlements and are not cumulative beyond service years. The maximum entitlement of 15 days Special Leave with Pay (per service year) to attend to individual needs and responsibilities is now inclusive of and not additional to Cultural Leave provisions.

## 4. Policy Detail

The categories defining acceptable and/or valid reasons for employees to request Special Leave with Pay have been extended to encompass and address the specific and unique cultural requirements and obligations of the Aboriginal and Torres Strait Islander workforce. As a consequence, a separate/defined category of Special Leave with Pay (Cultural Leave) has been incorporated into the existing Special Leave with Pay provisions for SA Health employees.

The provisions and entitlements associated with this category of Special Leave with Pay are specific to Aboriginal and Torres Strait Islander employees and provide access to paid leave entitlements for the purpose of meeting traditional law, customary law and family obligations, and/or participating in national cultural activities.

Accordingly, the SA Health Chief Executive (or delegate) may grant up to the equivalent of 15 days special leave with pay each service year to Aboriginal and Torres Strait Island employees to enable them to meet individual needs and responsibilities associated with cultural obligations and requirements, including activities associated with:

- Meeting traditional law, customary law and *family* obligations; and/or
- Participating in national cultural activities.

The cultural obligations and activities (associated with Aboriginal and Torres Strait Islander cultures) that would meet the criteria for Cultural Special Leave with Pay can be defined as (but are not limited to):

- Traditional and customary law requirements which may include the requirement to participate in or attend an initiation ceremony, or a ceremony relating to men's business or women's business.

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- *Family* and community obligations which may include (but are not limited to):

  ▪ Attending to or making arrangements for the care of a sick *family* member; *or*

  ▪ organising a funeral and affairs for a deceased *family* member; or

  ▪ attending the funeral of a *family* member; *or*

  ▪ fulfilling community obligations including required attendance at community meetings.

- Cultural activities include (but are not limited to):

  ▪ NAIDOC week (which occurs in the first full week of July each year)

  ▪ National Sorry Day (held on 26th May each year)

## Cultural Leave – Maximum Paid Leave Entitlement

The maximum entitlement for Special Leave with Pay under this category is the equivalent of 15 working days* per service year for Aboriginal and Torres Strait Islander employees. Part Time employees are entitled to Special Leave with Pay on a pro rata basis.

*The entitlement to Cultural Leave, Special Leave with Pay is included within (and is not in addition to) the existing Special Leave with Pay provisions for SA Health employees. Entitlements accessed under this category will proportionally reduce an employee's overall entitlement to Special Leave with Pay accordingly.

## Applications for (Paid) Cultural Leave

Special leave with Pay for the purpose of Cultural Leave may only be granted where an employee makes a formal application. Where possible, requests/applications for Cultural Leave should be submitted in a timely manner to enable alternative workforce arrangements to be implemented (where necessary) as soon as possible.

Timely submission of applications will assist SA Health Divisions, Departments and Health Networks/Services to accommodate requests.

It is acknowledged however, that in certain instances (eg cultural matters requiring the employee's urgent attention due to unforeseen circumstances), a period of notice may not be possible.

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## Consideration and Granting of Requests

In assessing and granting requests for Special Leave with Pay for the purpose of Cultural Leave for Aboriginal and Torres Strait Islander employees, the delegate may:

- Request reasonable evidence of the legitimate need for the employee to be granted time off.

- Request further information from the employee or seek advice from the relevant Health Network/Service (or SA Health) Aboriginal Health Division/Directorate to determine the nature of the cultural obligation and/or the essential requirement of an applicant to participate in a cultural activity.

Whilst it is at the discretion of the Chief Executive (or delegate) to determine whether time off with pay is to be granted to an employee or otherwise, all applications for Special Leave with Pay under this category need to be given fair and proper consideration and treated in a culturally sensitive manner; demonstrating respect for the specific cultural obligations associated with Aboriginal and Torrens Strait Islander cultures.

Non approved Special Leave with Pay requests under this category need to be supported by clear and justifiable reasons which should be communicated to the applicant as soon as possible.

If appropriate, other leave (Special Leave without Pay, flexi-time or other accrued leave entitlements) may be offered in lieu to enable the employee to attend to cultural obligations and activities during working hours.  For example, in instances where an application for Special Leave with Pay has not been approved on the basis that the applicant has exceeded the maximum entitlement to Special Leave with Pay for the current service year, alternative leave arrangements may be negotiated.

**Note:**  Before approving any request for paid Cultural Leave, the delegate needs to ascertain what, if any Special Leave with Pay entitlements the employee has already accessed within the current service year. This action is necessary to ensure that the maximum entitlement to Special Leave with Pay (15 working days per service year) has not been exceeded (or will not be exceeded) if a request is approved. Any entitlements accessed under Cultural Leave or any other category of Special Leave with Pay (within the same service year) will proportionally reduce the availability of entitlements to Cultural Leave for that service year.                    Page 6

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## 5. Definitions

**Aboriginal employee**

A person employed by SA Health who is of Aboriginal decent; who identifies as an Aboriginal person; and, who is accepted by the Aboriginal community in which they live.*

**Torres Strait Islander employee**

A person employed by SA Health who identifies as, or is a descendant of a Torres Strait Islander person.*

**Special Leave with Pay**

A specific category of employment entitlements available to employees for which there is a maximum paid entitlement and prescribed conditions.

Special Leave with Pay provisions enable employees to apply for and access paid leave to assist them to meet short term individual needs and responsibilities that cannot be attended to outside of working hours.  NB:  Special Leave with Pay is subject to approval following determination of availability of service year entitlements and the legitimate need for access.

**Cultural Leave, Special Leave with Pay**

A supplementary Special Leave with Pay Category designed specifically for Aboriginal and Torres Strait Islander employees to enable them to meet their cultural obligations and to participate in cultural activities which can legitimately only be conducted or attended to within working hours.

**Family – extended *family* relationships**

For the purpose of this Policy, family represents and covers the extended families that exist within Aboriginal and Torres Strait Islander cultures and the obligations that may exist in addition to, and irrespective of bloodline relationships.

*Family* extends to cover relationships where there is a close association.

**NAIDOC**

National Aborigines and Islanders Day Observance Committee (NAIDOC).

NAIDOC week is a week of celebrations which occurs annually in the first full week of July each year; and is a national cultural event which celebrates Aboriginal and Torres Strait Islander cultures, and provides an opportunity to recognise the contribution of Indigenous Australians.

**National Sorry Day**

A national day of cultural significance and importance to Aboriginal people which is held on the 26th of May each year.  National Sorry Day honours the 'Stolen Generations' specifically those Aboriginal peoples who were forcibly removed from their families as a result of past government assimilation policies and actions.

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## 6.  Related and Referred to Documents

- SA Health (Health Care Act) Human Resources Manual, in particular Section 7.7 Special Leave With Pay

- Commissioner's Standard 3 – Responsive and Safe Employment Conditions, in particular Section 3.4 Leave, Attachment D – Special Leave With and Without Pay

- SA Health Care Act 2008

- SA Public Sector Act 2009

- SA Health Aboriginal Employment Policy

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