

# Readiness Audit and Needs Assessment Tool

---

## A. Purpose

Before your school district embarks on a specific attendance support and wellness initiative, the first step is to complete the Readiness Audit and Needs Assessment Tool included below. This assessment builds awareness about the elements that support employee attendance in your school district. It will also help to identify workplace initiatives that positively influence employee health, as well as organizational opportunities that should be in place to support an integrated attendance support and wellness model.

The second step is to prioritize the activities and establish clear timelines.

This assessment will examine the following aspects of your school district:

- data collection and analysis
- wellness support
- attendance awareness and support
- disability management



## B. How to Complete the Needs Assessment

Members of your school district who have experience with the different aspects listed above should help complete this needs assessment. Ensure you have a clear understanding of the current data and processes that support employee well-being within the district. You may wish to ask various stakeholders to assist. It can be helpful to have each of the identified stakeholders independently complete the questions below and then discuss all the responses as a group.

Check the *Yes*, *No* or *In Progress* box for each question in the checklist. Once complete, the corresponding number for each *No* or *In Progress* answer can be marked in the Results Implementation Plan (see Step 5 of the Readiness Audit and Needs Assessment Tool) and discussed with BCPSEA and relevant stakeholder groups to identify the steps required to meet or improve that aspect of your school district's operations. Each school district should identify priorities and highlight the key areas for improvement. Questions noted with a \* are **Critical Elements** of the Attendance Awareness and Support Program.

### Step One: Data Collection and Analysis

The first step in developing an attendance support program is to analyze your school district's attendance and absence data. This will allow you to see where your efforts will be most effectively focused and enable you to establish baselines to track your progress.

1. Data Collection and Review (* items are <b>Critical Elements</b> of the Attendance Awareness and Support Program)				
#	Question	Yes ✓	No ✓	In Progress ✓
1.1	Data is being collected through an HRIS system (see Section 5, Data Collection and Review).*			
1.2	Codes have been established for all leaves under the collective agreement.*			
1.3	Employees are reporting absences using appropriate codes, or codes are being assigned through Human Resources or payroll for all absences.*			
1.4	Employees are reporting absences even when a replacement employee is not required.*			
1.5	Paid sick leave is being reviewed for total days absent.*			
1.6	Unpaid sick leave is being reviewed for total days absent.*			

1.7	<p>The school district collects and reviews attendance data to determine average number of absences and incidental absences (1-5 days) per employee*, including:</p> <ul style="list-style-type: none"> <li>➤ sick time (paid)</li> <li>➤ sick time (unpaid)</li> <li>➤ medical appointment leave (if in collective agreement or employment agreement)</li> <li>➤ family illness leave in excess of statutory family responsibility or compassionate care leaves under the <i>Employment Standards Act</i> (if in collective agreement or employment agreement)</li> </ul> <p>but not including the following:</p> <ul style="list-style-type: none"> <li>➤ approved long-term disability leaves</li> <li>➤ approved periods of absence under short-term disability plans</li> <li>➤ approved period of absence due to workers' compensation claims</li> <li>➤ approved vacation or other leaves not related to illness (e.g., union leave, bereavement leave, jury duty)</li> <li>➤ leaves under the <i>Employment Standards Act</i> (e.g., maternity, parental, family responsibility).</li> </ul>			
1.8	The school district collects and reviews attendance data to determine average number of absences and incidental absences per employee (as above) by employee peer group and classification.*			
1.9	The school district collects and reviews attendance data to determine average absence days by location.			
1.10	The school district collects and reviews attendance data to determine average absence days by demographics, day of week and/or month.			
1.11	The school district collects and reviews attendance data to determine average duration of absences per employee, by peer group and classification.			
1.12	The school district creates reports and determines average attendance data (as above) for a 12-month period.*			
1.13	Monthly attendance reports can be sent to all managers for their specific employee group(s).*			
1.14	Employee replacement costs are tracked and calculated.*			
1.15	The school district tracks when an absent employee has not been replaced.*			
1.16	The school district collects and reviews trends in its benefits premium costs.			
1.17	The school district regularly reviews the current status and prognosis of employees on long-term disability leave, short-term disability leave or workers' compensation claim.*			

1.18	School district management and staff responsible for reviewing and analyzing attendance information have been trained and regularly review the legal requirements and best practices to protect personal information under the <i>Freedom of Information and Protection of Privacy Act</i> .*			
1.19	Any other data collections and analysis practices can be noted here:			

**Step Two: Activities that Support Employee Health and Well-Being**

Basic supports need to be accessible to support employees’ health and wellness. These programs and initiatives will help guide your conversations with your employees about attendance and health, allowing you to connect them to resources that may help them take steps to improve their health and wellness.

<b>2. Health and Well-Being (* items are Critical Elements of the Attendance Awareness and Support Program)</b>				
#	Question	Yes ✓	No ✓	In Progress ✓
2.1	School district mission and value statements support employee wellness.			
2.2	Senior management promotes initiatives that support employee health and well-being.*			
2.3	The school district has an effective occupational health and safety program, including a functioning occupational health and safety committee.*			
2.4	Senior management and supervisors understand their obligations under occupational health and safety legislation and promote a safe workplace.*			
2.5	The school district has a bullying and harassment policy that complies with WorkSafeBC requirements, including annual review and training for employees and supervisors.*			
2.6	The school district provides some form of on-site physical health initiatives (e.g., flu shots, screening programs, blood pressure, cholesterol, diabetes).			
2.7	The school district provides some form of on-site mental health programs (e.g., stress management programs, resiliency training).			
2.8	A confidential Employee and Family Assistance Program (EFAP) is readily available.*			

<b>2.9</b>	The school district is aware of the macro health risks of their employee population through a health risk assessment report or analysis of health benefit claims experience.			
<b>2.10</b>	The school district regularly reviews its EFAP statistics to evaluate program utilization rates and primary drivers of use.*			
<b>2.11</b>	The EFAP is visibly promoted.*			
<b>2.12</b>	The school district supports physical and psychological fitness (school district teams, discounts for fitness centres, meditation sessions).			
<b>2.13</b>	The school district has general wellness awareness programs (lunch and learns, posters, pamphlets).			
<b>2.14</b>	The school district visibly promotes community health resources (for example: elder care, nutrition/weight management programs, support groups).			
<b>2.15</b>	The school district accesses resources from free and reduced cost programs (i.e. WellnessFits (Canadian Cancer Society),) Guarding Minds@ Work (mental health), My Good Health (Pacific Blue Cross).			
<b>2.16</b>	The school district has developed and promotes among employees and administration a written summary of wellness resources available to employees.*			
<b>2.17</b>	Any other initiatives or programs that promote employees' health and well-being can be noted here:			

### Step Three: Elements that Support Attendance Awareness and Support

Before you embark on implementing an attendance support program, ensure that the school district has the culture, policies and processes in place to make it successful.

<b>3. Attendance Support (* items are Critical Elements of the Attendance Awareness and Support Program)</b>				
#	Question	Yes ✓	No ✓	In Progress ✓
3.1	Senior management is supportive of the principles of attendance support.*			
3.2	The school district has established an internal working group, representative of executive/senior management and supervisors within each employee group, to develop and implement an attendance support program.			
3.3	The school district has considered whether new roles will be created or current roles, tasks and decision-making processes will significantly change, and how the school district will support affected employees through transition.*			
3.4	The school district has calculated organizational attendance averages (by employee peer group, classification, location, etc.).*			
3.5	The school district has reviewed baseline data related to attendance (i.e. frequency, site, organizational average, employee peer group, etc.).*			
3.6	The school district has determined top percentiles for employee attendance that will trigger participation in the program or has developed other criteria to identify pattern absences.*			
3.7	The school district has established consistent process and criteria to ensure that employees are not referred to the program if this is not appropriate. Records of each exception, with rationale, are maintained.*			
3.8	The school district has adopted common procedures to support attendance, and confirmed that they are consistent with applicable collective and employment agreements.*			
3.9	The school district has clearly defined steps and scripts to approach and support each employee at the top percentile(s) of absenteeism.*			
3.10	School district representatives responsible for developing and implementing the attendance support program meet regularly with senior management.*			
3.11	School district representatives responsible for developing and implementing the attendance support program meet regularly with the Board.*			

3.12	Principals, supervisors and other staff with responsibilities in the attendance support process understand and are supportive of the principles and intended benefits of the program.*			
3.13	Principals and supervisors have received comprehensive (role play, interactive) training on best practices in attendance support and are prepared to have attendance conversations with their staff.*			
3.14	The school district has established a process to support principals and supervisors through transition, such as one-on-one and small group meetings.*			
3.15	Employees are informed in a sensitive and confidential manner about their personal attendance record, and how it compares to their peer group.*			
3.16	Union leadership and other stakeholders (such as the local JEIS Committee) have been consulted and understand the program, principles and benefits.*			
3.17	Employees have been given information and understand the principles and intended benefits of the Attendance Awareness and Support Program through in-person and written communications.*			
3.18	The school district has established a process to solicit feedback from employees and unions to continue to evaluate the program and address concerns promptly.*			
3.19	Any other attendance support initiatives can be noted here:			

## Step Four: Disability Management

Disability management is the process you follow when an employee has an occupational or non-occupational injury or illness that disables him/her from performing all or part of his/her job. The goal is to prevent illness and injury from happening—but when it does, you’ll have the tools to support an employee’s recovery at work or during absence, with the goal of returning the employee to work as soon as is appropriate for their recovery plan.

4. Disability Management (* items are <b>Critical Elements</b> of the Attendance Awareness and Support Program)				
#	Question	Yes ✓	No ✓	In Progress ✓
4.1	Employees know who to contact at the school district for assistance when unable to perform their job due to illness or injury.*			
4.2	Administrators, supervisors and employees understand their roles in disability management and the duty to accommodate.*			
4.3	Subject to collective agreement and other requirements, managers or Human Resources are in regular contact with employees that are off work due to illness/injury, to ensure connection to work is maintained.*			
4.4	The school district has a procedure for the confidential storage of sensitive medical documentation (see Section 3, Privacy).*			
4.5	The school district uses standardized documentation to communicate and request information as part of the disability management process across employee groups (i.e., forms, letters, etc.).*			
4.6	The school district is able to acquire clear statements of functional restrictions and prognosis when developing a return to work plan for all employee groups.*			
4.7	The school district has access to expert medical advice when needed in complex cases.*			
4.8	The school district follows up to ensure return to work plans and accommodation are effective.*			
4.9	The school district allots budget for assistive devices as required.			
4.10	The school district is able to review occupational ergonomics.			
4.11	The school district reviews baseline data related to occupational and non-occupational injuries or non-occupational injuries/illnesses (i.e., duration of claim, injury type, frequency, etc.).*			
4.12	The school district has job demands analyses available for major positions.			

<b>4.13</b>	The school district has identified modified duties for each classification for return to work or stay at work scenarios (transitional work options).			
<b>4.14</b>	Managers or Human Resources are trained in implementing return to work plans or accommodation.*			
<b>4.15</b>	Any other disability management initiatives can be noted here:			

**Step 5: Clarifying Your School District’s Needs**

Based on the completed needs assessment, review areas where improvement is needed in order to effectively manage employee attendance and provide greater support to employee health and well-being.

**Results: Building an Implementation Plan**

#	<i>Initiative/Program to be Developed/Implemented</i>	<i>Timeline for Completion</i>	<i>Responsible Person(s)</i>	<i>Status In Progress/Incomplete</i>
	<b>1. Data Collection &amp; Analysis</b>			
	<b>2. Wellness</b>			
	<b>3. Attendance Support</b>			
	<b>4. Disability Management</b>			