

Conducting an Organizational Review

Why complete the Guarding Minds at Work organizational review?

The organizational review will help senior leaders explore their existing policies and practices in relation to the psychosocial factors in Guarding Minds at Work. It can be done on its own or in addition to the survey. The survey reports your employees' perspectives on each of the psychosocial factors. The organizational review is an opportunity for senior leaders to reflect on what the organization is already doing to support each psychosocial factor and write down what they believe their organization or team's score would be for each psychosocial factor. By completing both the organizational review and the survey, you can generate a report that compares senior leader and employee perspectives. It also provides a way to ensure that leadership is informed in advance of the implementation of the survey.

Who completes the organizational review?

The organizational review may be completed by one or more individuals within the organization – this may vary depending on the size and nature of the organization. For example, the organizational review may be completed by the owner or manager within a small-sized business or work team. In a medium-sized business, the organizational review may be conducted by the senior leader with their human resource professional. In a large-sized business, there may be a range of potential individuals available to undertake the process, including senior leaders, human resources professionals, occupational health and safety representatives, division/department heads, or regional managers.

You may wish to create a subcommittee or select a small group of staff to participate in the process. To heighten the objectivity of the process, you may also consider using an external psychological health and safety consultant with expertise in the Guarding Minds at Work process.

What is involved in the organizational review process?

The organizational review process involves the completion of worksheets that guide an exploration of the current state of psychological health and safety. Each worksheet is dedicated to one of the psychosocial factors.

Each organizational review worksheet includes:

- ✓ Definition of the psychosocial factor
- ✓ Benefits of addressing the psychosocial factor
- ✓ Information and data that would be helpful to refer to or collect
- ✓ Checklist of what your workplace might be doing now
- ✓ Review of psychosocial factor statements
- ✓ Rating comparison of the organizational review score versus the survey score

What do you need to complete the organizational review?

The following may help you complete the organizational review worksheets:

Documentation: Gather and refer to policies, practices, reports, documents, statistics, or other data relevant to employee and organizational functioning.

Employee input: Information from your employees including suggestions, complaints, health and safety committee reports, and employee surveys.

How to select psychosocial factors for the organizational review

It can be difficult to determine where to begin. For this reason, we recommend that you prioritize the organizational review worksheets you will complete. Focus on one psychosocial factor at a time. This helps to streamline your efforts and increases your likelihood of success.

Begin by completing organizational review worksheets for:

- (a) Factors that disproportionately impact your organization financially or reputationally.
- (b) Factors that are particularly relevant to changes occurring within your organization or work unit. For example, if there have been recent changes in leadership, you may want to select the corresponding organizational review worksheet for clear leadership and expectations.
- (c) Factors that are particularly relevant to key incidents or events such as grievances, human rights violations, mergers, etc.

We recommend that you eventually complete all the worksheets in order to provide the most thorough review of your organization's psychological health and safety.

Generating a report

Once management has completed the organizational review worksheet for all the psychosocial factors, collect them and input the information as instructed below to generate a report once the survey for employees has closed.

Here are the steps to generate the report:

- Log into your Guarding Minds at Work Dashboard
- Select 'Active Surveys'
- Select 'Organizational Review Input'
- Input the responses that management has completed within all the organizational review worksheets
- Once you have input the answers for all the psychosocial factors, select 'Next'
- You can generate your report once the corresponding employee survey has closed

Please note, management can choose to complete only the organizational review worksheets they deem a priority, but in order to generate a report with comparisons, management will need to complete an organizational review worksheet for all the psychosocial factors.

Where should you begin?

Review the organizational review worksheets for each of the psychosocial factors to determine where you might begin addressing psychological health and safety issues. Where possible, complete the organizational review worksheets before, or at the same time as, administering the survey to your employees to allow for comparison and to ensure leaders are informed.

Organizational Review Worksheet

BALANCE

OBJECTIVE: A work environment where there is support for employees to manage the demands of work, family and personal life.

What are the potential benefits of effectively addressing balance?

- Greater satisfaction and morale
- Reduced stress and burnout
- Enhanced performance and productivity
- Reduced absenteeism and disability

What information may be helpful to refer to or collect?

- Accurate records of time worked including outside of regular work times
- Data on use of vacation time and accrued time off
- Absenteeism and disability data
- Data on benefits utilization
- Complaints or grievances related to time off
- Current policies related to flexible working arrangements and time off

Consider the extent to which the following happen:

- Flexible work arrangements such as work from home, part-time work, and job sharing
- Opportunities to choose between overtime or time off
- Mechanisms to ensure daily breaks are taken
- Requirement to take vacation time away from the workplace
- Benefits for employees and their families that address both mental and physical health
- Supports such as access to daycare, elder care, therapy and health education
- Positive work-life balance modelled by management

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. We encourage employees to take their entitled breaks. This can include lunchtime, sick time, personal days, vacation time, earned days off and parental leave.				
2. All employees are able to reasonably balance the demands of work and personal life.				
3. We promote work-life balance.				
4. All employees can talk to their supervisor when they are having trouble maintaining work-life balance.				
5. All employees feel supported in their workplace when they are dealing with personal or family issues.				
6. We have programs or policies to prevent worker burnout.				

Do issues related to balance present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of balance?

What currently gets in the way of employees finding work-life balance? How can this be addressed?

If there is a difference between the organizational review and the survey results, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Balance.

Organizational Review Worksheet

CIVILITY AND RESPECT

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

What are the potential benefits of effectively addressing civility and respect?

- Effective teamwork and positive morale
- Reduced conflict
- Fewer grievances and reduced legal risk
- Reduced customer, patient, or client complaints
- Reduced turnover

What information may be helpful to refer to or collect?

- Current policies and processes pertaining to conflict resolution, respectful workplace, bullying, or harassment
- Stated mission statement, code of conduct, or code of ethics
- Both formal and informal complaints or grievances
- Data on conflict, grievances, mediation proceedings, or external consultations

Consider the extent to which the following are happening:

- Employee training and resources on conflict management, team building, and emotional intelligence
- Management training on conflict resolution, team building, and emotional intelligence
- Immediate and effective response to inappropriate workplace behaviour
- Documentation of incidents of inappropriate employee behaviour
- Effective complaint processes
- Effective conflict resolution processes including follow-up data on outcomes
- Ongoing training for all employees on dealing with difficult people including, customers, patients, or clients
- Investigation and documentation of incidents of inappropriate behaviour including by customers, patients, or clients
- Support from management for employees dealing with difficult customers, patients or clients

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. Employees treat each other with respect and consideration in our workplace.				
2. We effectively handle conflict among employees.				
3. Employees from all backgrounds are treated fairly in our workplace.				
4. Unnecessary conflict is kept to a minimum in our workplace.				
5. We effectively address inappropriate behaviour by customers, patients, or clients.				
6. Employees at work show sincere respect for others' ideas, values and beliefs.				

Do issues related to civility and respect present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of civility and respect?

What could your workplace do to improve civility and respect among employees as well as between employees and customers, patients or clients?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Civility and Respect.

Organizational Review Worksheet

CLEAR LEADERSHIP AND EXPECTATIONS

OBJECTIVE: A work environment where there is effective leadership and support so that employees know what they need to do, have confidence in their leaders and understand impending changes.

What are the potential benefits of effectively addressing clear leadership and expectations?

- Employees have clear expectations regarding their role and job responsibilities
- Work gets done efficiently
- Employees are more resilient during times of stress and change
- Trust in the direct supervisor is enhanced
- Issues are resolved before they have a negative impact

What information may be helpful to refer to or collect?

- Employee feedback including suggestions, meeting records, or exit interviews
- Formal performance evaluations of supervisors
- Record of employee evaluations conducted by supervisors
- Complaints or grievances about leaders
- Stated management responsibilities and expectations
- List of required training for supervisors and leaders

Consider the extent to which the following are happening:

- Supervisors are recruited, trained, and promoted for effective leadership skills
- Regular performance reviews are held for supervisors, managers, and other leaders
- Supervisors know how to respectfully and effectively help improve performance
- Leaders are measured and held accountable for how they protect psychological safety
- Supervisors are given time and resources to support the success of their employees
- Job descriptions are current and clear

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. Every employee knows what they are expected to do in the workplace.				
2. All employees are informed about important changes at work in a timely manner.				
3. Difficult situations at work are addressed effectively.				
4. We provide clear and effective communication.				
5. Supervisors support every employee to do their job successfully.				

Do issues related to clear leadership and expectations present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of clear leadership and expectations?

What could be done to improve clear leadership and expectations?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Clear Leadership and Expectations.

Organizational Review Worksheet

ENGAGEMENT

OBJECTIVE: A work environment where employees feel connected to their work, co-workers and their organization and are motivated to do their job well.

What are the potential benefits of effectively addressing engagement?

- Enhanced performance and productivity
- High employee morale and motivation
- Enhanced recruitment and increased retention of talent
- Improved customer, patient, and client relations

What information may be helpful to refer to or collect?

- Absenteeism rates and turnover rates
- Existing employee survey data on engagement
- Employee feedback including employee suggestions, meeting records, exit interviews
- Measures of quality or productivity

Consider the extent to which the following are happening:

- Employees are willing to give additional effort at work when needed
- Participation in optional job-related activities such as committees or volunteer opportunities
- Employees are willing to help each other, such as covering during illness or absence
- Positive morale is observed even during times of change
- Levels of turnover are low for your sector
- Employees feel proud of the work they do

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. All employees enjoy their work.				
2. All employees are willing to give extra effort at work if needed.				
3. Employees feel like their work is an important part of who they are.				
4. All employees are committed to the success of their organization.				
5. All employees are proud of the work they do.				
6. All employees are committed to the success of their team.				

Do issues related to engagement present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of engagement?

What could be done to improve engagement?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Engagement.

Organizational Review Worksheet

GROWTH AND DEVELOPMENT

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

What are the potential benefits of effectively addressing growth and development?

- Increased employee competency
- Trust and honest communication between employees and leaders
- Retention of talent
- Effective succession planning and internal promotions
- Enhanced product or service quality

What information may be helpful to refer to or collect?

- Training and development policies
- Training budget per employee
- List of internal and external opportunities for training and development
- Participation rates and feedback from past training and development sessions
- Current processes for promotion

Consider the extent to which the following are happening:

- Performance evaluations include training or development plans
- Opportunities for interpersonal and emotional skills development
- Clarity about necessary training for advancement or promotion
- Opportunities for job shadowing
- Ongoing job-related skill development
- Dedicated time and funds for training, growth, and development
- Transparent communication about potential promotion opportunities
- Employees are given opportunities for promotion or advancement

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. Employees receive feedback at work that helps them grow and develop.				
2. Supervisors provides helpful feedback on employee performance.				
3. We are open to employee ideas for taking on new opportunities in the workplace.				
4. Employees have the opportunity to take on new challenges.				
5. We value employees' ongoing growth and development.				
6. Employees are given adequate time at work to participate in training.				
7. Employees are provided with the necessary training to perform well in their job.				

Do issues related to growth and development present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of growth and development?

What could be done to improve the opportunities for growth and development of employees in your workplace?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Growth and Development.

Organizational Review Worksheet

INVOLVEMENT AND INFLUENCE

OBJECTIVE: A work environment where employees are included in discussions about how their work is done and have input into decisions that impact their job.

What are the potential benefits of effectively addressing involvement and influence?

- Enhanced performance and productivity
- Greater employee motivation and job satisfaction
- Employees take an active role in addressing challenges at work
- Positive relations between employees and management

What information may be helpful to refer to or collect?

- Job descriptions
- Employee feedback, suggestions, meeting records, and exit interviews
- Performance evaluation data
- Description of organizational processes that involve consultation with employees

Consider the extent to which the following are happening:

- Each employee is engaged in a discussion of how they will complete their work
- Employee input is encouraged by all levels of management
- Regular meetings are held to discuss work, safety and team concerns
- Employees are engaged in discussing potential changes with clarity about why some changes are not negotiable
- Employees have appropriate control over how their work tasks are organized
- Employees are encouraged to suggest improvement of how work is done

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. All employees are able to talk to their immediate supervisor about how they do their work.				
2. All employees have some control over how they organize their work.				
3. All employees' opinions and suggestions are considered at work.				
4. All employees are informed of important changes that may impact how their work is done.				
5. All employees are encouraged to participate in decisions that impact their work.				

Do issues related to involvement and influence present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of involvement and influence?

What could your workplace do to improve involvement and influence?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Involvement and Influence.

Organizational Review Worksheet

ORGANIZATIONAL CULTURE

OBJECTIVE: A work environment characterized by the shared values of trust, honesty and fairness.

What are the potential benefits of effectively addressing organizational culture?

- Higher job satisfaction and morale
- Improved teamwork and productivity
- Positive relationships between leaders and employees
- Enhanced retention and recruitment
- Positive public and community image

What information may be helpful to refer to or collect?

- Employee feedback, suggestions, meeting records, and exit interviews
- Existing employee survey data related to organizational culture
- Turnover rates
- Customer, patient, and client feedback
- Policies and practices related to inclusion and discrimination
- Online and print reviews of your organization

Consider the extent to which the following are happening:

- Challenging interpersonal situations are dealt with quickly and effectively
- Management is held accountable for decisions
- There is transparency in decision-making
- Proactive steps are taken to ensure inclusivity
- Discrimination is specifically discussed and prevented
- Work environment is characterized by trust, honesty, tolerance, and fairness

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. Employees are held accountable for their actions.				
2. Employees feel a sense of community in this workplace.				
3. Employees and management trust one another.				
4. Our workplace is inclusive of employees with diverse backgrounds and points of view.				
5. Our workplace demonstrates organizational values at all levels.				

Do issues related to organizational culture present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of organizational culture?

What could your workplace do to improve organizational culture?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Organizational Culture.

Organizational Review Worksheet

PROTECTION OF PHYSICAL SAFETY

OBJECTIVE: A work environment where management takes appropriate action to address physical hazards in order to protect the psychological health and safety of workers.

What are the potential benefits of effectively addressing the protection of physical safety?

- Fewer job-related errors, incidents, accidents, and injuries
- Reduced costs from work absence
- Improved physical and psychological health and safety of employees
- Reduced legal and regulatory costs and violations
- Improved labour-management relations

What information may be helpful to refer to or collect?

- Current organizational and industry safety policies
- Relevant provincial, territorial, or federal legislation, such as occupational health and safety legislation and labour standards
- Health and safety related documentation, including minutes of health and safety meetings
- Safety inspection reports and follow-up records
- Accident, workplace-related illness, and incident reports, including near misses

Consider the extent to which the following are happening:

- Health and safety committees are active and meet regularly
- All employees can access designated health and safety representatives in a timely manner
- Regular, documented workplace inspections are conducted to identify physical and psychological hazards
- Measures are taken to eliminate or control identified hazards
- Safety programs and policies are reviewed regularly with attention to their impact on employee psychological safety
- Incident investigation protocols are reviewed regularly and updated as needed to remain effective
- Health and safety committee recommendations are acted on promptly
- Timely and effective supports are available following a critical incident such as defusing, debriefing, employee and family assistance programs, or psychological treatment

- Safety requirements, programs, and policies are current and communicated to all staff regularly, including new hires
- Job descriptions include details of both psychological and physical hazards to which employees may be exposed
- Employees are encouraged to share concerns about potential physical safety issues
- Employees receive training on how to identify, report and investigate physical hazards
- Employees have input into the development of safety policies and practices
- The physical work environment does not negatively impact psychological health, such as through crowding, isolation, excessive noise, or improper lighting
- Employees are trained to understand how physical hazards can affect psychological health and safety
- Employees are trained to minimize their exposure to, and the impact of, physical hazards
- Employees have the equipment needed to reduce risks to health and safety, such as proper lighting, noise reduction devices, panic alarms, and proper ventilation

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. We take appropriate action to protect employees' physical safety at work.				
2. All employees have sufficient training to help protect their physical safety at work. This could include emergency preparedness, safe lifting, violence prevention, etc.				
3. When physical accidents occur or physical risks are identified, all employees feel we respond effectively.				
4. All employees have the equipment and tools they need to do their job in a physically safe way such as protective clothing, adequate lighting, and ergonomic seating.				
5. All employees feel we respond appropriately when workers raise concerns about physical safety.				

Do issues related to protection of physical safety present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of protection of physical safety?

What could your workplace do to improve protection of physical safety?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Protection of Physical Safety.

Organizational Review Worksheet

PSYCHOLOGICAL AND SOCIAL SUPPORT

OBJECTIVE: A work environment where the organization is supportive of employees' psychological health concerns and provides assistance as needed.

What are the potential benefits of effectively addressing psychological and social support?

- Improved overall psychological health of employees
- Increased productivity
- Reduced costs from absenteeism and turnover
- Successful and sustainable return-to-work
- Improved teamwork and decreased conflict

What information may be helpful to refer to or collect?

- Trends in benefits utilization data such as drug prescriptions, employee and family assistance programs use, psychologists or other regulated mental health professionals
- Trends in absenteeism and turnover data
- Existing employee survey data such as that on stress or mental health concerns
- Return-to-work data
- Accommodation policies and procedures

Consider the extent to which the following happen:

- Supervisors and managers are trained to identify and support distressed employees
- Employees are provided with education and information on mental health issues and resources
- Training is provided on stress management strategies
- Access to psychologists or other regulated mental health professionals is supported
- Employee and family assistance program or equivalent services are provided
- Benefits include:
 - Adequate access to counseling and therapy
 - Massage, acupuncture
 - Physiotherapy, chiropractic, naturopathic
 - Prescription drugs
 - Short-term and long-term disability
 - Other

- Policies to assist employees who remain at work while dealing with stressful health or life situations
- Regular, supportive communication with off-work employees
- Formal return-to-work policies and programs
- Formal and effective accommodation processes for employees with disabilities

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. We offer services and benefits that support employees.				
2. We support employees if they are psychologically distressed.				
3. Everyone in our workplace understands the importance of protecting psychological health and safety.				
4. We support employees with disabilities to do their jobs effectively.				
5. We help employees cope with workplace stress.				

Do issues related to psychological and social support present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of psychological and social support?

What could your workplace do to improve psychological and social support?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Psychological and Social Support.

Organizational Review Worksheet

PSYCHOLOGICAL COMPETENCIES AND DEMANDS

OBJECTIVE: A work environment where there is good fit between employees' interpersonal and emotional competencies, their job skills, and the position they hold.

What are the potential benefits of effectively addressing psychological competencies and demands?

- Enhanced performance and overall productivity
- Greater job satisfaction
- Increased retention of talent
- Reduction in stress and absenteeism

What information may be helpful to refer to or collect?

- Recruitment and selection procedures
- Current job descriptions
- Employee feedback, suggestions, meeting records, and exit interviews
- Personnel testing results
- Performance evaluation results
- Complaints and grievances
- Sick days and disability by job role
- Turnover by job role

Consider the extent to which the following are happening:

- Detailed job descriptions that include interpersonal and emotional competencies required for the job
- Comprehensive hiring processes, such as competency based and behavioral interviews
- Providing a mentor for employees new to the role
- Promotion decisions that consider employees' interpersonal and emotional competencies
- Job analyses that identify interpersonal and emotional competencies and demands
- Orientation and ongoing training for the relevant interpersonal and emotional competencies
- Opportunities for alternate positions in cases of poor job fit

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. Hiring and promotion decisions consider the interpersonal skills necessary for specific positions.				
2. We hire employees who fit well within the organization.				
3. Every employee has the social and emotional skills needed to do their job well.				
4. We prepare employees to deal with the psychological demands of their job.				
5. Employees are able to do their job in a way that meets their personal and professional values.				

Do issues related to psychological competencies and demands present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of developing psychological competencies and aligning that with the demands?

What could your workplace do to develop psychological competencies and align that with the demands?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Psychological Competencies and Demands.

Organizational Review Worksheet

PSYCHOLOGICAL PROTECTION

OBJECTIVE: A work environment where employees' psychological safety is ensured.

What are the potential benefits of effectively addressing psychological protection?

- Reduced costs from absenteeism and disability
- Reduced conflict
- Fewer job-related errors, incidents, accidents and injuries
- Fewer grievances and reduced legal liability

What information may be helpful to refer to or collect?

- Data on absenteeism
- Policies and processes related to respectful workplace, harassment or bullying
- Documentation of incidents of inappropriate behaviour, including by customers, patients or clients
- Rates of staff complaints, grievances, and litigation

Consider the extent to which the following are happening:

- Shared understanding of organizational expectations for ethics, values and privacy
- Policies and processes to prevent and address harassment, discrimination and violence
- Annual review of the impact of policies, processes and procedures
- Immediate and effective response to any inappropriate behaviour
- Effective and prompt approaches to conflict resolution
- Employee training on harassment, discrimination and violence at work

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. All employees feel that their organization is committed to minimizing unnecessary stress at work.				
2. All employees feel that their organization makes efforts to prevent harm to employees from discrimination.				
3. All employees feel that their employer makes efforts to prevent harm from unsafe behaviours by clients, customers, or patients.				
4. All employees would describe their workplace as being psychologically safe.				
5. All employees feel that their organization deals effectively with situations that may threaten or harm employees such as harassment, discrimination, or violence.				
6. All employees feel that their organization makes efforts to prevent harm from bullying and harassment.				
7. All employees are able to raise concerns about psychological safety in their workplace.				

Do issues related to psychological protection present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of psychological protection?

What could your workplace do to improve psychological protection?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Psychological Protection.

Organizational Review Worksheet

RECOGNITION AND REWARD

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

What are the potential benefits of effectively addressing recognition and reward?

- Enhanced employee satisfaction, motivation and loyalty
- Improved teamwork and positive employee morale
- Increased retention and enhanced recruitment of talent
- Enhanced employee and labour relations

What information may be helpful to refer to or collect?

- Industry and regional information on pay equity within job roles
- Compensation formulas
- Existing employee recognition and reward system details
- Employee contracts and collective agreements• Data on use of vacation time and accrued time off

Consider the extent to which the following happen:

- Existing expressions of recognition and appreciation for extra effort at work
- Recognition of individual and team successes and accomplishments
- Regular reviews and appropriate adjustments to employee salaries
- Performance-based bonuses and pay increases
- Profit-sharing or stock option opportunities
- Non-monetary rewards such as time off, better shifts, preferred task selection, or hand-written thank you notes

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. All employees feel that their immediate supervisor appreciates their work.				
2. All employees are paid fairly for the work that they do.				
3. All employees feel that their employer shows appreciation for extra effort made.				
4. Our organization celebrates our shared accomplishments.				
5. All employees feel like their employer values their commitment and passion for their work.				
6. All employees are recognized for good performance.				

Do issues related to recognition and reward present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of recognition and reward?

What could your workplace do to improve recognition and reward?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Recognition and Reward.

Organizational Review Worksheet

SPECIFIC AREAS OF CONCERN

OBJECTIVE: A work environment where employees are protected from bullying, harassment, discrimination, and chronic stress.

What are the potential benefits of effectively addressing specific areas of concern?

- Reduction in grievances, complaints, human rights violations and litigation
- Improved employee well-being
- Increased productivity and creativity
- Reduction in absenteeism and turnover

What information may be helpful to refer to or collect?

- Records of grievances, complaints, human rights violations and court settlements
- Processes for responding to complaints
- Investigation processes for critical incidents
- Absenteeism data
- Turnover rates
- Exit interview information

Consider the extent to which the following are happening:

- Prevention of discrimination on the basis of a perceived or actual disability
- Prevention of discrimination on any grounds prohibited by applicable human rights legislation
- Bullying or harassment prevention including effective policies and procedures
- Mental health awareness and stigma reduction strategies
- Mitigation for chronic mental stress in the workplace
- Orientation and ongoing training to manage the potential impacts of stressful or traumatic incidents at work
- Clear processes for reporting incidents at work without fear of negative consequences
- Support for those who have experienced any type of harassment, discrimination, bullying or violence

Please answer the statements below with respect to your workplace:	YES	NO
1. In our workplace no one experiences discrimination.		
2. In our workplace no one is bullied or harassed verbally, physically, or sexually.		
3. In our workplace no one is being treated unfairly because they have a mental illness.		
4. In our workplace no one is exposed to events that could be traumatic.		
5. Work does not have a significant, negative impact on the psychological health of anyone in our workplace.		

Do issues related to these specific areas of concern present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of managing specific areas of concern?

What could your workplace do to eliminate or prevent specific areas of concern?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Specific Areas of Concern.

Organizational Review Worksheet

WORKLOAD MANAGEMENT

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

What are the potential benefits of effectively addressing workload management?

- Enhanced performance and productivity
- Reduced stress and burnout
- Fewer job-related errors, incidents, accidents, and injuries
- Increased retention

What information may be helpful to refer to or collect?

- Accurate records of hours worked including overtime
- Processes for task and project assignment
- Metrics used to determine delegation of work
- Quality control data
- Employee feedback about workload and work pace
- Data on job-related errors, incidents, accidents and injuries
- Absenteeism or leave data

Consider the extent to which the following are happening:

- Explicit and reasonable workload expectations
- Written job descriptions that include productivity expectations
- Overtime pay or accrued time off provided for overtime worked
- Employees are encouraged to utilize break and vacation time
- Deadlines are modifiable as necessary
- Workload is assigned equitably
- Appropriate flexibility for employees to prioritize tasks
- A process to help employees manage short-term increases in workload
- Equipment, support, and resource needs dealt with in a timely fashion
- Systems are in place to cover staffing shortages due to vacation, sick leave or unfilled positions

Please answer the statements below with respect to your workplace:	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree
1. The amount of work all employees are expected to do is reasonable for their positions.				
2. All employees can talk to their supervisor about the amount of work they have to do.				
3. All employees have the equipment, resources and time needed to do their job well.				
4. All employees' work is free from unnecessary interruptions and disruptions.				
5. All employees have control over how their tasks and responsibilities are prioritized.				

Do issues related to workload management present a greater risk to particular groups of employees? For example, newer employees, certain job roles such as supervisors, shift-workers, immigrants, remote workers, etc.?

What are the strengths in your workplace? What do you already do well and want to continue to do in terms of workload management?

What could your workplace do to improve workload management?

If there is a difference between the organizational review score and the survey score, what may be contributing to the difference in perception between employees and the leaders who did the organizational review?

Is further action required in this area? Yes No

If yes, see [Suggested Actions and Resources](#) for Workload Management.