



**Executive Advisory
Services Report
2017-2018**

ADVISORY SERVICES FOR EXECUTIVES (ASE)

Dear APEX members,

I am pleased to provide you with the Advisory Services for Executives (ASE) 2017-2018 report.

It is a privilege to be the Senior Advisor to Executives: assisting when needed on a short part of your journey, sharing your stories and hearing your challenges, and fascinating career paths. Understanding the extent to which you have all invested so much of yourselves for the Public Service is extremely humbling and rewarding. I look forward to continuing to be of service in the years to come.

Johanne LeBlanc

Senior Advisor to Executives | Conseillère principale aux cadres supérieurs

Association of Professional Executives of the Public Service of Canada | Association professionnelle des cadres supérieurs de la fonction publique du Canada

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Executive Summary

The ASE is a free, confidential service offered only and to all Executives in the Federal Public Service, in Canada and abroad. It complements services rendered by Executive Services or HR teams, the Ombuds, Integrity and Informal Conflict offices. The ASE has acquired a reputation for being a neutral, impartial, third party where Executives can tell their story and seek advice regarding their work-related situations. While the service is known to many, others expressed they were unaware of it and wish they had known about it earlier.

This year three hundred and six (306) executives used the ASE. Over 58% were Executive women, and regional, first language and overall levels mirror representation at the Public Service levels.

Out of the 19 categories used to track advice reasons, the top 6 are: Career Management, Investigations, Terms and Conditions, Relationship with superior, Retirement and Health (including mental health).

Executives understand they must deliver on many priorities and recognize the need to be increasingly agile to adapt to rapidly changing landscapes, including technology and data. Workloads, the need for horizontality and collaboration, increased accountabilities and administration have put additional burden on EXs over time. Confirmed by the 2017 APEX Work and Health Survey, EXs are under tremendous pressures, work long hours, and many face health and mental health issues. Being unrepresented, Executives, especially the new ones, feel vulnerable, isolated and need organizational supports. Despite these realities, these same Executives are fiercely loyal, talented, dedicated and proud to be leaders in the PS, in service to Canadians.

The #timesup and #MeToo movements, focussed on sexual harassment, may have created a more open environment for those who are feeling harassed in any way to come forward. In the latter half of the year, 70% of cases at the ASE were harassment-related, although none were sexual in nature. Despite high volumes of harassment complaints, the vast majority of formal cases resolved this year and for which a client Executive was a respondent, were unfounded.

Dissatisfaction with compensation, performance and talent management were routinely raised by clients of all levels. Help with career management and information or interpretations of Terms and Conditions of EXs were particularly popular.

Difficulties between Executives and their superiors remains high and while this may not be surprising, the manner in which the Executive is sometimes treated by their superior, is. It is understood by EXs that the demands and expectations for them are higher than for non-EX's, however, being subjected to incivility from superiors does not align with the PS core values. There is also a very pronounced sense from Executives clients that they fear reprisal if they escalate their concerns.

Finally, in this era of embracing diversity and inclusion, it is surprising that a significant number of client Executives felt victims of ageism. In cultures where contributions of all are truly valued as strengths, this would not be the case.

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CONFIDENTIALITY, DATA COLLECTION AND SERVICE STANDARDS

Maintaining confidentiality is key to delivering the Advisory Services. To ensure privacy, client information is kept secure and only accessed by the Senior Advisor, as long as the file is active, and is destroyed upon completion of the Annual Report or upon client request.

The general trend information is used by APEX to establish priorities and, lead discussions with the EX community and central Agencies, in order to bring about positive change.

The service standard of responding to all client phone calls and emails within one business day is met 99.67% of the time. A new on-line client satisfaction survey is being developed for the 2018-2019 fiscal year.

1. CAREER MANAGEMENT - This category remains the top reason why Executives approach the Senior Advisor. One hundred and six (106) clients requested assistance with career management, specifically in seeking help to determine career goals and paths to consider, including good positions and Departments to target, networking and promotion strategies, review of staffing mechanisms and options, referrals to coaching for Board preparation, etc.

While career is the stated reason for the advice sought, the underlying reasons disclosed during the conversations range from; frustration with the talent management or performance process in their Organization, career stagnation, unsustainable workload pressures, not feeling valued or recognized, cultural misalignment, values and ethics misalignment, and more often than not, to escape a difficult relationship with their superior.

2. INVESTIGATION – Ninety-five (95) Executives, of which 59% were women, sought assistance for investigations and harassment situations (not all were formal). Of the total, 42% were on the receiving end of a complaint and another 28% were suffering harassment from their superiors. The remainder were involved in various other internal administrative investigations or external ones.

As respondents to a harassment complaint, many Executives felt they lacked information and support from their organizations and were isolated dealing with the emotional and psychological effects of being accused. Those facing this situation for the first time, as well as those not visibly supported by their managers fared worst.

In extreme cases, the Executives were either removed from their positions before any investigation was launched or told there would be an 'informal' process run by their superior. These tend to be the most distraught Executives; possibly on or headed for sick leave and feeling the person in authority over their careers was not impartial and their career was at risk. Many Executives explored hiring a lawyer to defend their interests, at their own expense as natural justice did not prevail.

Removal of Executives as a quick-fix to solving workplace issues fails to take into consideration the complexities and roots of work conflict, the presence of human biases and is generally not effective, as well as being extremely detrimental to the EX.

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Many harassment complaints where the Executive was a respondent came from employees who were being performance-managed. Many clients felt they were doing what was expected of them by managing poor performance, however a number of them regretted doing so as it resulted in a complaint which, despite being largely or completely unfounded, ultimately impacted their reputation, career and health negatively and for which many felt unsupported.

Very few Executives tabled formal complaints against their superior, for fear of retribution.

Procedural fairness did not appear to be respected in a high number of cases where; respondents felt treated as guilty from the outset, allegations were not always shared with them, little time was given to respond to lengthy allegations, and in almost all cases, the investigator did not interview the respondent's witnesses, only the complainant's.

3. TERMS AND CONDITIONS – During the past year, the Advisor received 87 requests for information concerning terms and conditions of employment. The questions were as broad and varied as there are terms and conditions. Examples include interpretation of leave and special working arrangement provisions, due process for harassment complaints, grievance process for Executives, performance management, sick leave, return to work, classification, compensation, retirement, etc. Again, the stated reason for the service was terms and conditions, however, the underlying issues discovered during the interactions are very similar to those stated in the Career Management section. At the root of this is a lack of clear and concise information from the employer and large variations in practice between departments.

4. RELATIONSHIP WITH SUPERIOR – A relationship of trust between an Executive and their superior is essential for the success of both. Difficulties with that relationship creates incredible dysfunction, distress, and an unhealthy work environment for all.

While conflict between people is normal and healthy, a large portion of us avoid it or use it to attack, sometimes from a position of 'strength and authority'. Both strategies fail to manage conflict constructively and it worsens. We often have little information to go on when making assumptions and then we act on it, exacerbating the conflict.

Executives often relate that their relationship with their superior deteriorated over time or they worked well with their former boss, but not with a new one. Incivility in the way an Executive is treated in these situations seems to be the norm. While it is a reality that working styles, expectations and chemistry differ, it seems a stretch to imagine a good or very good performing Executive, with a proven track record, suddenly becoming a 'performance issue' overnight. Perhaps working on the underlying conflict is a more effective avenue.

Seeking help (and new skills) from conflict experts early when detecting relationship issues is very helpful, as is challenging our assumptions, validating them with data, understanding our own biases, and remaining open-minded. Despite attempting the above, when there is no longer a good fit between the manager and the EX, an exit strategy can be put in place jointly and conducted with mutual respect.

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5. RETIREMENT – Fifty-one (51) Executives sought advice on retirement. For many, this was not their preferred option. Several noted experiencing discrimination on the basis of their age or following a return from sick leave, feeling that they were being pushed out of their Department or Agency. Many were leaving toxic environments and or difficulties with their superiors.

The concerns over any delays in payments owed and in accuracy perceived to be related to Phoenix was noted by virtually all 51 clients.

6. HEALTH -This year almost 100 clients told the Advisor that their mental and/or physical health was a concern to them and/or they were under a doctor's care, and that the reason for their illness was directly linked to an unhealthy work environment. Re-integration into the workplace following a leave or temporary assignment seems to be difficult for many Executives, who feel they get little support and are not welcomed back into their organization. Often the manager they had prior to the leave has moved on and a new one who does not know them, is in position. Many struggle to get their organizations to accept their gradual return to work schedules, and, when they do, the Executives are often given temporary low-priority projects with little staff nor budgets.

The majority of clients facing a mental health issue are not comfortable raising it with their superiors. EXs are told to be 'resilient' almost at any cost and most translate that to mean that any sign of vulnerability is unacceptable.

Of note, many clients face significant issues with the Insurer, particularly in the mental health arena (lack of compassion and knowledge about the devastating condition from case managers, benefits getting turned down, pressure to return to work too soon, lack of a proper return to work schedule). The last thing needed when someone is facing a health issue is more stress and the threat of financial hardship.

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Conclusion

Heads of Organizations play the central role in shaping culture. Together with their Executives, that vision is implemented and cascades through management to employees' level. Culture is set by the actions of leaders including how they treat each other. Incivility in senior ranks creates a negative culture, whilst the opposite is also true. As many clients relate and the APEX survey confirms, we have a unique opportunity to do better in this arena, to the great benefit of all.

In his 25th Annual Report, the Clerk noted "I will remain committed to the mental health and well-being of our workforce, including addressing harassment and discrimination". Executives are employees first and deserve the same level of respect and equity as we strive to afford to employees on these fronts. Principles of procedural fairness and natural justice are key in managing any form of complaint, both for respondents and complainants, as is support.

Although the Treasury Board Guide on Applying the Harassment Resolution Process states that if a complaint is determined to have been vexatious or made in bad faith, the complainant may be subject to corrective measures, the ASE is not aware of a case of corrective measures being taken.

Perhaps this avenue as well as protection from retaliation for Executives claiming harassment against other Executives and indemnification as respondents to complaints, can be considered in the future.

Still in the early days but offering a glimmer of hope, are the restoration strategies being explored following harassment complaints against Executives. Conversations about restoring the Executive's reputation, re-establishing trust in leadership, and focusing on the cultural repair work after allegations of harassment are occurring and are extremely worthwhile investments in order to heal teams.

As we evolve the PS from embracing Diversity to the much broader concept of Inclusion, any form of discrimination, thankfully, becomes unacceptable. With the refreshing shift of appreciation for all, valuing our seasoned Executives will undoubtedly grow. Progressive organizations are putting in place strategies to retain their experienced staff.

And finally, a focus on conflict competence in the senior ranks would go a long way to improving all relationships and ultimately the workplace as a whole.