Private and Confidential — Decision of the BCESA Board of Directors Regarding Parent Grievance

Date: November 10, 2026

Dear [redacted] and [redacted]

On behalf of the Bragg Creek Education Services Association (BCESA) Board of Directors, thank you for taking the time to share your concerns and provide supporting information. We recognize the importance of the matters you have raised and appreciate the opportunity to carefully consider them.

The Board received your written grievance on October 23, 2026, followed by supplemental submissions on October 30, 2026. A Special Board Meeting was convened on November 5, 2026, to review the grievance and the available evidence.

The Board considered each issue separately and applied the balance-of-probabilities standard to disputed facts. This letter communicates the Board's decisions and reasons, as authorized at the November 5 Special Board Meeting; it does not reopen or change the merits determined at that meeting.

Procedural History and Evidence Considered

In reaching its decisions, the Board considered the following principal evidence and documentation:

- Your October 23 written grievance, October 30 supplemental submissions, and [redacted]'s October 30 clarification;
- Signed screening-consent and funding forms;
- September Speech-Language Pathologist (SLP) informal and functional screening information, tracking-sheet entries, and related correspondence;
- Contemporaneous teacher and classroom information, together with information provided by parents;
- The psychologist's [redacted] diagnostic letter;
- Available Occupational Therapist (OT) screening information and the subsequent written OT report dated October 13;
- The SLP written report dated October 26;
- Calendars, correspondence, and records relating to the September 22 and 23 events;
- BCESA's October 28 status response and listed production of five documents, together with records concerning the existence of tracking and professional source records; and
- The PASI audit history, withdrawal and active-code removal records, BCESA policies, and applicable Alberta Education coding criteria.

Your submissions also referenced an external/private SLP report. As this report was not provided to the Board, it could not be considered as part of the review.

Throughout its deliberations, the Board distinguished between records created at the time of the events and reports prepared afterward. The BCESA Board Review was used solely as an internal management submission and organizational tool, rather than as independent evidence of its conclusions.

The Board considered management and witness information as submissions and evidence subject to the Board's independent assessment. It did not treat the confidential minutes, findings worksheet, internal Board Review, management question-and-answer documents, witness-preparation materials or legal advice as independent proof of their own conclusions. None of those confidential internal materials is attached to this decision.

Board Findings and Decisions

Overall disposition. The Board reviewed each of the 12 issues raised in your grievance individually.

The grievance was not upheld on Issues 1, 2, 4, 5, 6, 8, 10, and 11. The Board was unable to make a determination on Issue 9 due to insufficient evidence. Issues 3, 7, and 12 resulted in approved process improvements, without a finding or admission of wrongdoing.

The Board's findings and reasons for each issue are outlined below.

1. Code 47 Entry

Decision: Grievance not upheld.

The Board found that the September screening, the SLP tracking-sheet recommendation, teacher and parent information, and the attempted informal assessment provided a sufficient basis for the initial Code 47 entry. The Board recognized that the October 26 SLP report was prepared after the coding decision and therefore did not consider it contemporaneous evidence supporting the initial entry.

2. Code 44 Entry

Decision: Grievance not upheld.

The Board found that the September 29 change was based on the psychologist's [redacted] diagnosis considered together with multiple sources of information including the September SLP screening and tracking material, classroom information/observations, parent information, and available OT information.

The Board determined that the coding decision was not based on the diagnosis alone, but on the diagnosis considered alongside the available information.

The Board did not find or rely upon any formal Alberta Education approval or audit of BCESA in reaching this decision.

3. Code 44 Severity and Educational-Impact Documentation

Decision: This issue resulted in process improvement without a finding or admission of wrongdoing.

The Board found that information from multiple sources supported the presence of significant educational needs.

The Board also approved improvements to ensure that documentation of the severity and frequency of educational impacts, the level of adult assistance required, and modifications to the learning environment is clearer and more consistent at the time of coding decisions.

The Board did not treat the word “severe” as inherent in [redacted]. The Board acknowledged that an Individualized Program Plan (IPP) would further document [redacted]'s educational needs, required supports, and accommodations in collaboration with parents and teachers. However, the IPP had not yet been developed at the time Code 44 was entered and was therefore not relied upon to support the coding decision. The Board noted that, under BCESA's process, the IPP would be developed as part of planning and implementing [redacted]'s educational supports and services.

4. SLP Screening and October 26 Report

Decision: Grievance not upheld.

The Board distinguished the September 22 informal/functional screening from the October 26 written report. The October 26 report was understood to document information gathered earlier and was not treated as contemporaneous evidence supporting the September coding decisions.

The Board considered your concern about Hannah Schmitt’s October 21 text message. The Board accepted her explanation that the reference to "one-to-one" related to therapy services, while acknowledging that the wording could reasonably have caused confusion.

The Board did not make a broader finding that every professional obligation was satisfied.

5. September 22/23 Date Discrepancy

Decision: Grievance not upheld.

Based on calendars, correspondence, and records, the Board found that September 22 was the SLP screening date, and September 23 was the OT screening date as well as the date of the SLP’s parent email. The Board determined that these records sufficiently clarified the discrepancy concerning the dates of the screening activities.

6. OT Screening and Report Timing

Decision: Grievance not upheld.

The Board found that the OT screening occurred on September 23, the OT written report was dated October 13, and it was produced on October 28. The OT findings addressed functional areas different from those addressed by the SLP and did not independently determine Code 44. The Board made no general finding that a written report is never required before IPP completion.

7. Parent Notice and Consent

Decision: This issue resulted in process improvement without a finding or admission of wrongdoing.

The signed forms disclosed screening, assessment, funding, additional-support-needs/special-education coding, information sharing, and possible severe Program Unit Funding (PUF) codes.

However, the evidence did not establish that the specific Code 44 designation and its implications were clearly explained to the parents before the September 29 entry. The Board approved plain-language explanations of coding designations and documentation of code-specific conversations with parents. These improvements are intended to strengthen transparency and consistency in future communications and do not constitute a finding or admission of wrongdoing.

8. Original Records and October 28 Production

Decision: Grievance not upheld.

BCESA produced the five principal documents on October 28.

The Board also reviewed evidence about the existence of tracking records and professional source records. The Board did not make a categorical finding that parents have no entitlement to notes. Any further records request will be handled under applicable records, privacy, and professional obligations.

9. Alleged Code 30 Discussion

Decision: The available evidence did not permit the Board to determine, on the balance of probabilities, whether the alleged Code 30 discussion occurred. The Board therefore made no finding on this issue.

10. PASI Removal and History

Decision: Grievance not upheld.

The active code was removed and [redacted]'s withdrawal was effective October 21. Historical information remains in PASI. Any further alteration of that historical information lies with Alberta Education/Student Records or is otherwise outside BCESA's unilateral control.

11. Clearwater Allegation

Decision: Grievance not upheld.

The Board found that BCESA did not communicate with or control Clearwater. The Board had no evidence establishing Clearwater's independent rationale or a causal connection between BCESA's actions and Clearwater's decision.

12. Procedural and Policy Improvements

Decision: This issue resulted in process improvement without a finding or admission of wrongdoing.

The Board identified and approved opportunities for improvement such as: plain-language code explanations; documented code-specific parent discussions; a coding-decision checklist; a clearer

distinction between screening notes and final reports; clearer therapist documentation and report-timing expectations; a standardized records inventory and access-response process; and training, implementation, and Board follow-up. These improvements do not, by themselves, establish prior wrongdoing.

Actions Already Completed

BCESA has already recorded the withdrawal effective October 21, removed the active code, provided its October 28 status response, and produced the five principal documents. Any further changes to historical PASI information beyond BCESA's unilateral authority remain subject to Alberta Education/Student Records and applicable processes.

Further Procedure

If you disagree with this decision, you may consult Section 6 of BCESA's Grievance/Whistle Blower Policy. Under that section, a petition must be submitted to the President and must contain at least five names of Members in good standing with the Society. The policy provides that the President will call a Special Meeting within 14 days to discuss the concern; the President, or a Board member agreed upon by the grieving party and the Board, will chair; all sides will present within pre-arranged time limits; and the Special Meeting's decision will be binding and determined by majority vote. This information is provided neutrally and is not intended to encourage or discourage any further action.

Closing

The Board has taken its responsibility to review your grievance seriously and has sought to consider each issue carefully, fairly, and on the basis of the available evidence.

The Board appreciates the time you took in presenting your concerns. We recognize that the matters raised are important to you and your family. We recognize the importance of clear processes, reliable documentation, and respectful communication with families. The improvements approved through this review reflect our ongoing commitment to these principles.

Sincerely,



Allison Smith
Board President
For and on behalf of the BCESA Board of Directors