Workplace Strategies for Mental Health

Compliments of Canada Life



Facilitator guide

Building trust

Why are the resources created by Workplace Strategies for Mental Health free?

Since 2003, Canada Life has supported research and projects related to positive mental health in the workplace – including Workplace Strategies for Mental Health (Workplace Strategies). Workplace Strategies develops free resources to foster positive mental health and protect psychological safety in the workplace. Through collaboration with experts from diverse places and professions, Workplace Strategies provides tools that are both evidence-based and user-friendly.

This resource was based on the work of Mary Ann Baynton and Associates Consulting which pioneered this psychologically safer approach to building trust with employees. Thank you to Workplace Safety and Prevention Services, including Andrew Harkness, Alexander Petrisano, Janet Carr, Krista Schmid, Ann-Marie MacDonald, Brian Hansell, Desiree D'Souza, Katie O'Reilly, Kim Sunderland, Martine Oliveira and Nathan Kolar for piloting this workshop. Thanks to the Canada Life Health Consultants team, and Canada Life employees. We are also grateful for the thoughtful feedback from Joanne Roadley, Christine Hildebrand, David MacDonald and Phil Perczak.

Over the years, Workplace Strategies has developed high-quality resources including Guarding Minds at Work, Working through it, Supporting employee success, Psychologically safe leaders, Psychologically safe interactions, Plan for resilience and many more.

All are available to anyone free of charge, at workplacestrategiesformentalhealth.com, compliments of Canada Life.

Canada Life has long recognized that psychological health and safety impacts overall employee well-being and performance. They support many initiatives that align with their core values and benefit all Canadians, not just clients, from coast to coast. These include education, health and wellness, community development and social services.

What other workshop topics are available?

We've drawn on what we've learned to offer this workshop series so you can facilitate in organizations of all sizes on a wide variety of topics such as:

- Implicit bias
- Resolving conflict
- Building resilience
- Team building activities
- Supportive performance management
- Putting psychological health and safety on the agenda series

For a complete list of workshop resources go to clwsmh.com/materials.

Table of contents

Why are the resources created by Workplace Strategies for Mental Health free? 1

Introduction to the Workshop series 3

Facilitating this topic 4

Promoting this workshop 6

How to use this guide 7

Building trust 8

Learning objectives 10

When should the conversation framework be used? 11

Communicate without judgment 12

Additional techniques and resources 13

Engage the employee in solutions 15

A conversation framework 16

Discussion 19

What will you do differently? 22

More information and resources 23

Introduction to the Workshop series

Each of the Workplace Strategies for Mental Health workshop topics includes at least 3 resources:

Facilitator guide

Read through this guide and the participant handout before beginning to see where you might want to customize the workshop. The suggested wording is here to help. Modify it to meet your audience's needs and to suit your personal or organizational style.

If you have more than one hour for this workshop, you could spend more time talking about how to integrate these concepts at your workplace.

Slide presentation

The slide presentation is available from clwsmh.com/materials. You can also add slides related to your own organizational resources, procedures or strategies.

Participant handout

The participant handouts are available to print at clwsmh.com/materials or can be used digitally.

Facilitating team discussions

Facilitating team discussions is a guide that can help you increase your comfort level and effectiveness in managing participant responses and attitudes.

Facilitation options

- Project the slide presentations on a screen
- Present them through a webinar platform
- Use only the handouts

Facilitating this topic

Preparation

Before you begin you may want to:

- Identify who you will invite. This workshop is geared toward those who are responsible for managing or supporting employees
- Review the content at Developing a workplace plan and Supportive performance management before you facilitate this workshop. This will help you gain a broader understanding of the topic. You can also refer to the webpage to answer questions from your audience.
- Review, if available, existing performance management approaches to determine how using the conversation framework fits in.
- Consult with union representatives who are familiar with the collective agreement about introducing this process if you're in a unionized environment. This collaboration can support successful change.
- Review tips for dealing with any challenging workshop conversations on Facilitating team discussions.

Suggested materials

- **Projector or monitor** – for the slide presentation from a laptop or USB
- **Cables and adapters** – if necessary for projection
- **Remote** – to control slides
- **Participant handout for each participant** – either digital or printed
- **Pens** – for participants who haven't brought one
- Check out **virtual team discussions** in Facilitating team discussions for help facilitating this workshop online

Your audience

This session suits anyone who has conversations with employees about any workplace issues, including:

- **Team leaders**
- **Managers**
- **Supervisors**
- **Human Resources**
- **Union and worker representatives, who may find this approach helpful to support members struggling with work issues**

There's no limit to the total number of participants, but we suggest breaking into small groups of 3 – 4. This number allows discussion at tables if you're in person or in online breakout rooms if you're delivering the workshop by webinar.

You can provide the participant handouts digitally or have them printed. The participant handout is available at clwsmh.com/materials.

The slides for this topic are available at clwsmh.com/materials.

If you'd like to learn more about how to deal with difficult reactions from your audience, check out the helpful information in Facilitating team discussions.

Promoting this workshop

Use the following description to promote the workshop to potential participants. You can modify it to fit your audience as needed.

Building trust

Conversations with employees can be challenging when the topic's one that creates stress or uncertainty. This can include discussions about performance, conflict or behaviours. This workshop focuses on having these conversations in a psychologically safe way. Learning to do this will help the employee and make your job less stressful. In this session you'll learn to:

- Ask effective questions
- Engage employees in developing solutions
- Create practical approaches for accountability

If you'd like to do a deeper dive before we begin, read Developing a workplace plan and Supportive performance management.

Location:

Date:

Start time:

End time:

To register:

How to use this guide

Throughout this facilitator guide, you'll see some or all the following with the corresponding slide:

X minutes:

This is the estimated amount of time to spend on this slide if you want to keep within a one-hour time frame. Some slides may involve just a statement or two from you. Others engage the participants in discussion. Of course, if you have more time you can ignore these guidelines.

If you're facilitating this workshop for the first time, we recommend you follow the 1.5-hour time frame as closely as you can. This can reduce your stress and allow you to decide how much time you need in the future.

Facilitator notes

> This is a note to you, the facilitator, where we offer options or make suggestions. For example, discussing issues like conflicts or terminations may warrant more sensitivity. We may suggest alternative wording to help you stay focused on the topic at hand. This may also help you avoid getting pulled into challenges you can't solve in this time frame or setting.

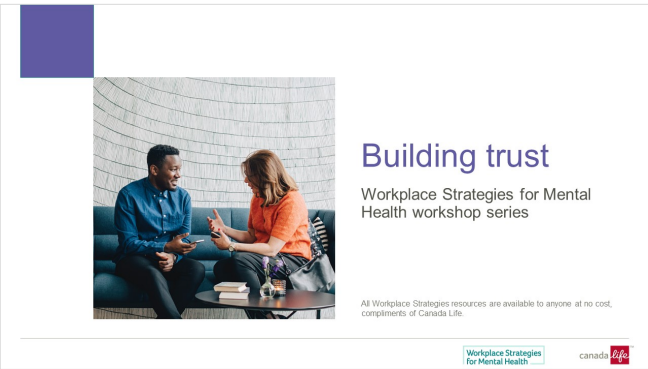
Suggested wording

You can read this out loud as provided or personalize it for your style and audience.
Text in **[square brackets]** is a quick note to you about process. Don't read it aloud.

Transition

Each slide ends with a sentence or two that helps you transition to the next slide.

Slide 1 | 2 minutes



Building trust

Facilitator notes

There isn't much time for introductions in a one-hour session. If you have extra time and a group of 12 or fewer, each person can introduce themselves. For larger groups, participants can introduce themselves to those at their table only.

To begin, ensure you've already introduced:

- Yourself, if there's anyone who may not know you
- Your role within the organization, if unknown to the group
- Why this discussion matters in your organization

Suggested wording

Welcome and thank you for taking part in this session building trust.

We have several workshops available in the series on supportive performance management. They include:

- **Communication techniques** – to deal with negativity, anger, defensiveness or silence
- **Supporting task improvement** – a process to support effective task completion
- **Complex situations** – like accommodation or behavioural issues
- **Developing a plan** – that includes all responsibilities and can be modified as needed

Today's focus is conversations that build trust and support employee success.

The most critical factor in building a trust relationship is your own trustworthiness.
Do you keep confidential information confidential? Do you follow through on your commitments?
Does what you say match what you do?

Consider your personal integrity. For the purpose of this session, we'll assume you're trustworthy.
We'll concentrate on building trust with employees who may not know your intentions are good.

Trust is often lost when an employee feels misunderstood or when they think demands of them are unreasonable. This is even more of an issue when an employee's experiencing stress in their personal or professional life.

Today's can be applied regardless of whether an employee has a mental health issue. It focuses on supporting success while they're at work. That employee may not be able to work at all if you take a more stressful or punitive approach. Instead, you'll learn how to ask questions to help an employee develop solutions to any issues they're experiencing at work.

Each of you has a handout to use throughout this session.

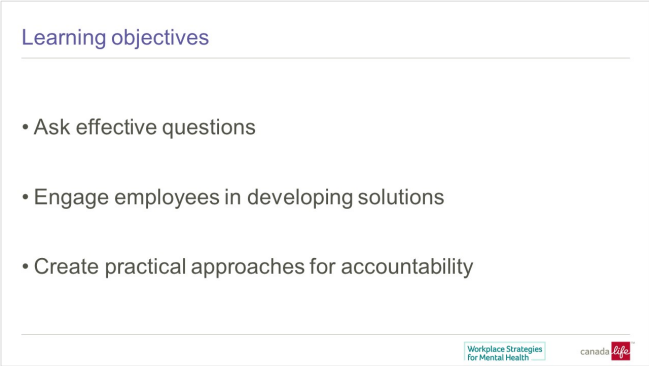
[If you're using introductions, you can do that here.]

Transition

At the end of this session, I'll ask you to share one thing you'll do differently as a result of what we discuss today.

Please keep this in mind as we go. It can be anything we cover or anything you talk about in your group.

Slide 2 | 2 minutes



Learning objectives

Suggested wording

The objectives of this session are to:

- Ask effective questions
- Engage employees in developing solutions
- Create practical approaches for accountability

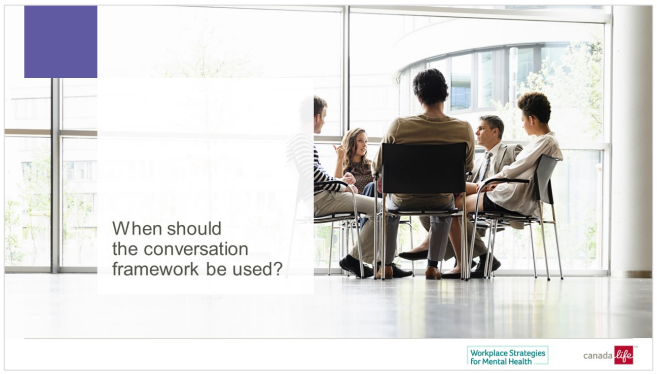
Everything we discuss today is available in more detail from Workplace Strategies for Mental Health. You won't need to take detailed notes unless you want to. The URL is in your handout if you want to learn more.

The process we'll discuss today can be successful with all employees, including those who may be experiencing stress or mental health issues. You'll learn how to engage employees in focusing on outcomes rather than problems. This approach can lead to increased productivity and decreased resistance.

Transition

Let's get started.

Slide 3 | 1 minute



When should the conversation framework be used?

Suggested wording

This framework has been used to discuss:

- Performance problems
- Attendance
- Return to work
- Accommodation
- Working relationships and,
- Work stressors

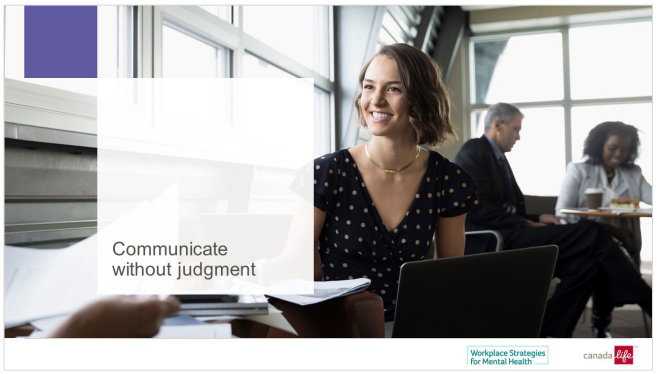
It's especially valuable when the employee is experiencing distress. Employees who are adequately supported at work often continue to be productive while experiencing life stressors like family breakdown or mental health issues. However, like any health issue, there may be times where the employee's mental health state won't allow them to function at work.

This framework is about asking questions rather than making demands or judgments that could destroy trust. We rarely know exactly what an employee is going through in their personal and professional life. This framework helps us to avoid making assumptions and to build effective relationships with our employees.

Transition

We'll now move on to communication strategies that can help you with all of your employee conversations.

Slide 4 | 2 minutes



Communicate without judgment

Facilitator notes

More information about avoiding judgments is included in Identifying workplace issues.

Suggested wording

Be aware of your assumptions and judgments about an employee's behaviour.

Take a breath before you start speaking. Consider the content and delivery of what you're going to say and how it might impact the employee.

Also, think about the time and place of your discussion.

- Are you frustrated, short of time, overwhelmed or angry?
- Is the employee racing out to pick up a child from daycare?
- If so, is this the best time to discuss the issue, or can you set up another time?

See a resource in your handout called Questions to ask before engaging.You can use it to prepare for any conversation with an employee.

Transition

It's possible to communicate without allowing your emotions to interfere with a supportive and productive discussion.

Slide 5 | 16 minutes



Additional techniques and resources

Facilitator notes

Due to time constraints you may only have time to read the points below and then go to the next slide. If you have more time, you can look up any of these techniques and teach them to your audience.

Suggested wording

The conversation framework can help you build trust through effective conversations with your employees.

For our short session today, we're going to jump in so you can get a feel for how the process works. We won't have time to cover many communications skills, so we'll provide links to some helpful strategies, like:

- Listening for understanding to learn ways to hear what someone means beyond the words they say.
- Why blame and shame don't work to help you recognize ways we might unintentionally make employees feel defensive or even angry.
- Developing a workplace plan is an approach to address complex situations that also supports performance and hold people accountable.

- Supporting employee success is a comprehensive resource to help address work issues such as
  - Making critical decisions
  - Tolerating stressful environments
  - And dealing with work relationships.

- Attribution error helps us understand the assumptions we make when we attribute others' behaviours to character flaws or external influences.

Transition

You can go to the Workplace Strategies for Mental Health website for additional tips and strategies like these ones to refine your approach.

Notes:

Slide 6 | 1 minute



Engage the employee in solutions

Suggested wording

We know that when we do something **with** employees, not to them, we benefit from creating competency. Encourage employees to develop their own solutions and build on their strengths.

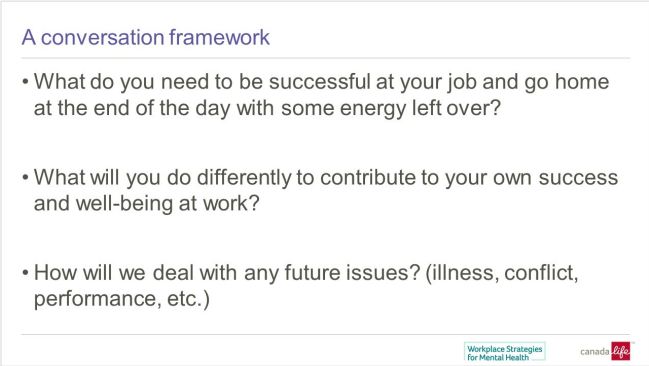
For example, ask them what they need to resolve the issue or problem. You may need to coach or guide them if their solutions violate policy or regulations. The end goal is to have employees think about solutions before coming to you with their concerns. Encouraging and supporting their ideas helps build employee confidence.

This approach has many other potential benefits, like building morale, increasing engagement and making your job easier. The best solutions often come from those who are doing the job.

Transition

With all of these strategies in mind, let's now turn to the collaboration process using the conversation framework.

Slide 7 | 25 minutes



A conversation framework

Facilitator notes

For each person in the pair to complete the activity, you will need to manage the time as follows:

- Starting with scenario 1
- 5 minutes for the first question
- 3 minutes for the second question
- 3 minutes for the third question
- Repeat with scenario 2 reversing the roles

Give 5 minutes for the first question and then 3 minutes for each of the next 2. Tell the participants when the first 5 minutes are up and ask them to move on to the second question and then after 3 minutes, to move onto the third question.

More details about using the conversation framework are included in Developing a workplace plan.

Scenario 1: An employee comes to you very stressed and says that they don't think they can meet their deadline for a very important report because of the complex systems and competing priorities in the workplace.

Scenario 2: An employee is dealing with serious family issues and is having problems concentrating at work.

Employee – use your own work situation to imagine what it might be like for you in this scenario.

Suggested wording

This framework helps you collaborate with your employee on solutions to workplace issues, including performance and return to work.

If you're dealing with complex issues, this process could take between 30 and 90 minutes to come up with an effective plan.

I want you to pair up. One of you will be the employer and one the employee and then you will switch. The employer will ask these questions to help the employee develop solutions to the issue. There are two scenarios in your handout. We don't need award winning performances. For the employee, we just want you to imagine yourself on your worst day dealing with these types of pressures. For the employer, we want you to experience the act of asking an employee for ideas rather than telling them what they need.

After 5 minutes, move on to the second question. You have 3 minutes each for the second and third questions. The employer is to write down the responses in each case. After 11 minutes, switch roles and do the second scenario. When you're done, I'll ask each pair to share one of your answers for each question with the group. That will be after a total of 22 minutes or **[state the actual time]**.

For those of you who will be taking on the role of employer, remember to ask, "And what else?" after the employee's answers. This helps the employee feel they're really being heard and allows as many potential solutions as possible to be identified.

Any questions before we begin?

[After questions have been fielded, use the timing shown in the facilitator notes. When the time is up, continue.]

Transition

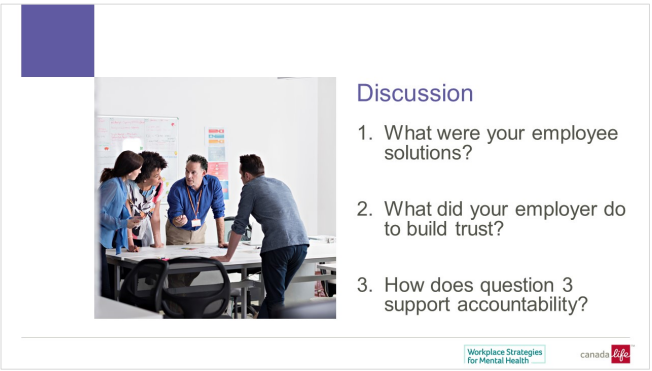
Let’s explore the variety of solutions that the employees came up with to address these issues.

These questions can help us become more effective in building trust through conversation.

Let's now look at some additional techniques that can help you refine your skills and address challenges.

Notes:

Slide 8 | 14 minutes



Discussion

Facilitator notes

- 2 minutes to introduce
- 2 minutes for participants to write their answers
- 10 minutes to discuss responses

If you are doing this virtually, you could have participants type in the Q&A or chat feature to get feedback, as well as allow people to speak directly. This helps those who would rather not speak up to still provide feedback.

Suggested wording

In your handout are these 3 questions:

1. What were your employee solutions?
    - When you had the role of the employer, list 1-2 solutions to the issue that your employee came up with.

2. What did your employer do to build trust?

    - When you had the role of the employee, list 1-2 things the employer did to help build your trust. You can include body language, phrases, tone and demeanour. Make sure your answers are specific and measurable.

3. How does question 3 support accountability?

    - When you were the employer, what answers to question 3 would help you to identify and address any future issues?

I'll give you 2 minutes to jot down answers to each question and then we'll discuss them as a group.

[After 2 minutes ask for volunteers to answer the questions.]

Let's start with question one. When you were in the role of the employer, what type of solutions did your employee come up with for scenario one?

[Take up a few answers.]

Staying with question one, when you were in the role of the employer, what type of solutions did your employee come up with for scenario 2?

[Take up a few answers.]

The beauty of this approach is that employees will come up with solutions that they believe will work for them. Even if you think they're not ideal, employees are much more likely to commit to their own success when they create the solution.

Now let's look at question 2, and this can apply to either scenario. When you were in the role of employee, what things did your employer do to help build your trust in this conversation?

[Take up a few answers.]

There are so many factors that will have an impact on the trust employees have in you. This includes, body language, phrases, tone and demeanour. But probably the most important factor is how genuine you are in your intention to support their success.

Question 3 exists primarily to support accountability and a way for you to address any future issues. When you were in the role of employer for either scenario, what approaches did your employee come up with?

[Take up a few answers.]

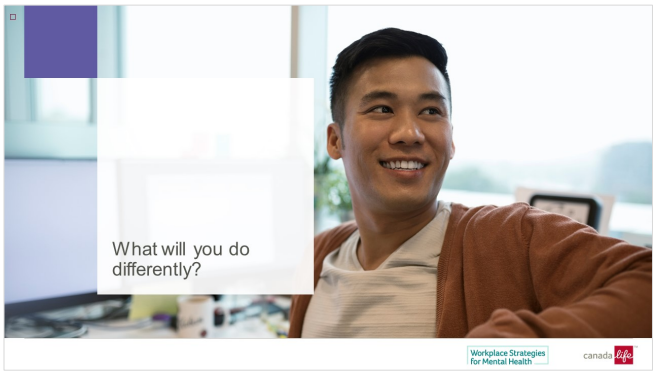
If you have to approach this same employee about this or any other issue, having the notes from your conversation framework gives you an easy way to address the issue. Simply reading through all or part of the notes and asking how these solutions are being implemented gives you the foundation on which to build a new or revised strategy.

Transition

We've covered a lot of ideas in a short amount of time. As I shared in the beginning, I want to ask each of you to write down one thing you'll do differently as a result of what you learned in this session.

Notes:

Slide 9 | 6 minutes



What will you do differently?

Facilitator notes

It's nice if everyone can share, but time may not allow it. If you have limited time, ask people to record their answer, share in their small group and then ask a few people to share their answer with the larger group. It's important for each person to record their answer so they're more likely to commit to doing something differently.

Suggested wording

Take a couple of minutes now to record one thing you'll do differently at work as a result of today's discussion. It can be something from the presentation or something discussed in your group. I'll ask you to share your answer when the time's up.

[Once time's up, ask as many people to share as time allows.]

Transition

Thank you for sharing what you'll do differently.

Slide 10 | 1 minute



More information and resources

Facilitator notes

On the back of the participant handout, there's a short list of some of the many free resources available. If you want your audience to read or use a particular resource, you may want to point it out at the end of your session. If you're short for time, you can skip this.

Suggested wording

Go to Workplace Strategies for Mental Health for more information about strategies to resolve workplace issues or create a psychologically safe workplace. Everything on this site is available at no cost in both English and French. There are some examples of what they have to offer at the back of your handout.

Thanks again and enjoy the rest of your day.

Notes:

Notes:

Workplace Strategies for Mental Health

Compliments of Canada Life

Workplace Strategies for Mental Health resources are:

- For all employers, people leaders and employees
- Available in English and French
- Evidence- or practice-based
- Available to anyone at no cost

Examples of the resources available at clwsmh.ca/materials include:

Identifying workplace issues

Learn the questions to ask yourself and the employee before a potentially sensitive discussion. Topics include:

- Considering your own needs
- Focusing on solutions
- Addressing workplace and mental health stressors
- Creating a list of resources for these issues

Leadership development

Improve the comfort and effectiveness in resolving workplace issues to enhance psychological health and safety for all. These resources can help.

Psychologically safe leadership assessment

Identify and support leadership strategies that are psychologically safe for you and all leaders in your organization.

Resolving conflict

Use this unique approach to help effectively resolve conflict, including when mental health is a factor. Both parties maintain their dignity while changing the way they interact with each other.

Responding to issues

Use these practical and action-oriented guidelines to address work issues, including:

- Conflict
- Performance
- Accommodation
- Impairment
- Return to work
- Violence

Supporting employee success

Use this free tool to help employers help an employee create and follow a workplace plan that addresses performance and workplace stressors.

Supporting return to work success

Plan before an employee returns from leave to help prevent potential challenges in areas such as working relationships and performance.

All Workplace Strategies for Mental Health resources are available to anyone at no cost, compliments of Canada Life.

canada life™

We’d love to hear how you used this free resource!

Contact us through social media or at clwsmh.com

Twitter LinkedIn YouTube

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