Workplace Strategies for Mental Health

Compliments of Canada Life



Facilitator guide

Putting balance on the agenda: **creating awareness**



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.

Extensive expert collaboration for this series came from Workplace Safety and Prevention Services. Many thanks to Andrew Harkness, Alexandra Petrisano, Janet Carr, and Krista Schmid. We're also grateful for the thoughtful feedback from 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 clwsmh.com, compliments of Canada Life.

Canada Life has long recognized that psychological health and safety impacts overall employee well-being and performance.

Canada Life supports many initiatives aligning with their core values to benefit all Canadians, not just clients, from coast to coast. These include initiatives focused on 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 task improvement
- Putting psychological health and safety on the agenda series

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

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Introduction to the

On the agenda workshop series

The National Standard of Canada on Psychological Health and Safety in the Workplace drew on the psychosocial factors identified in Guarding Minds at Work. These factors range from balance to psychological protection. They help employers identify what might impact employee psychological safety. The Standard recommends engaging all employees in developing strategies to improve psychological health and safety. This workshop series and the free downloadable materials described below provide a discussion framework to improve each psychosocial factor.

Creating awareness facilitator guide

The **Creating awareness** facilitator guide provides suggested wording you can modify to meet the needs of your audience and your personal and organizational style.

Creating awareness is the first workshop provided for each psychosocial factor and must be done before the Creating change workshop. In some cases, creating awareness may be all you need for your team to begin improvements in this area.

The **Creating awareness** workshop can be completed in as little as one hour. Spending more time discussing the topic can be valuable in supporting awareness and changes in attitude and behaviours.

Creating change facilitator guide

Creating change is a deeper dive into each psychosocial factor as described in Guarding Minds at Work.

Whether or not you've completed the Guarding Minds employee survey, this workshop will help your group focus on evidence-based approaches known to have a positive impact.

Creating change is optional but is dependent on completing the **Creating awareness** session first.

The **Creating change** workshop is meant to be a 2.5 hour session. If you have more time, you may discuss in more detail how you'll take action in your workplace.

Facilitation tips for leaders

Facilitation tips for leaders is a guide that can help you increase your comfort level and effectiveness in managing participant responses and attitudes.

Slide presentations

The Creating awareness and Creating change slide presentations are available from clwsmh.com/materials. You can also add slides related to your own organizational resources, policies, procedures or strategies.

Participant handouts

The **Creating awareness** and **Creating change** participant handouts are available to print at clwsmh.com/materials or can be used digitally.

Facilitating this topic

Preparation

Before you begin:

If you've done the Guarding Minds at Work survey, review the results of the workload factor to understand how the employees responded.

- **If available, review any existing policies on:**
  - Scheduling
  - Personal time
  - Work from home
  - Family leave
  - Personal phone calls during work time
  - Family emergency response
  - Caregiver responsibility at the organizational and department levels

This way you'll know if any participant suggestions violate existing policy. You can still consider these suggestions. Explain that you need to take them to senior leadership first.

- If available, review data related to personal leaves, reports of burnout and casual absenteeism. This helps you to be aware of existing issues that may be related to a lack of balance.
- Find out who in your organization could help with more serious issues like widespread burnout among team members. This could include a resource to help them and decision makers who could affect policy change. Be prepared to share this information with anyone who needs it. Also let them know that in this workshop you're seeking constructive ways to prevent such problems in the future.
- It could be helpful to have someone available who can intervene if there's a participant who becomes overwhelmed with this discussion. This could be someone who's available in person, online or by telephone.
- If you'd like some tips for dealing with difficult conversations during your workshop, see Facilitation tips for leaders
- If you're in a unionized environment, be sure to include relevant union representatives who are familiar with the collective agreement in this discussion. This is to ensure any suggestions developed don't violate the collective agreement and are acceptable to all parties.
- Talk to senior leaders about employee time and organizational budget limitations to increase balance.

Suggested materials for an in-person workshop

- **Projector or monitor** – for the slide presentation from a laptop or USB
- **Cables and adapters** – if necessary for projection
- **Remote** – to control slides
- **Whiteboard or flipchart** – to record participant responses
- **Dry erase markers**
- **Sticky notes in medium and large sizes** – if available it can be easier to write responses on sticky notes at the tables and attach to a flipchart, whiteboard or the wall. Some sticky notes will have one sentence on them, but others will have more detail. You may use paper and pen or a flipchart if sticky notes aren't available.
- **Participant handout for each participant** – either digital or printed
- **Pens for participants**
- **Small stickers** – for voting at the end. You can also use pens to create checkmarks.

Check out **virtual team discussions** in Facilitation tips for leaders for help facilitating this workshop online



Your audience

This session is suited for teams who regularly interact at work and want to improve psychological health and safety. It engages the team in creating awareness about how to improve balance.

Others who may be interested in participating in this workshop include all workplace stakeholders and any team including sports or associations who want to improve how they work together.

You may also want to facilitate this session with just leaders. Participating in the entire workshop can help leaders develop innovative ideas and set reasonable limitations to what might be possible in supporting employee balance. It will also help prepare them to deliver the same workshop to their own teams.

There's no limit on the number of participants. We suggest groups of 3 to 4 to allow small group discussion either at a table or in an online breakout room.

You can provide the participant handouts digitally or have them printed.

Learn more about how to deal with difficult reactions from your audience in Facilitation tips for leaders.

Promoting this workshop

To help you promote the workshop to potential participants you can use the following description or modify as needed:

Mail

Reply all | Delete | Junk | Block | ···

Putting balance on the agenda workshop: creating awareness



Improving psychological health and safety is a process of continual improvement. Everyone needs to be involved. This session is focused on discussing what balance at work means for our team in a practical way.

It's looking forward to constructive actions that will increase our ability to support work/life balance overall. Please come prepared to make a positive contribution by thinking about what would support your balance at work.

Location:

Date:

Start time:

End time:

To register:

Workplace Strategies for Mental Health

canada life

How to use this guide

Throughout this facilitator guide, you'll see some or all of 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 timeframe. Some slides involve just a statement or 2 from you. Others engage the participants in discussion. Of course, if you have more time you can ignore these guidelines.

Facilitator notes

This is a note to you, the facilitator, where we offer options or make suggestions. For example, discussing events like downsizing, collective bargaining, injuries or terminations may warrant more sensitivity. We may suggest alternative wording to help you stay focused on solutions. This also helps you avoid getting pulled into past challenges.

Suggested wording

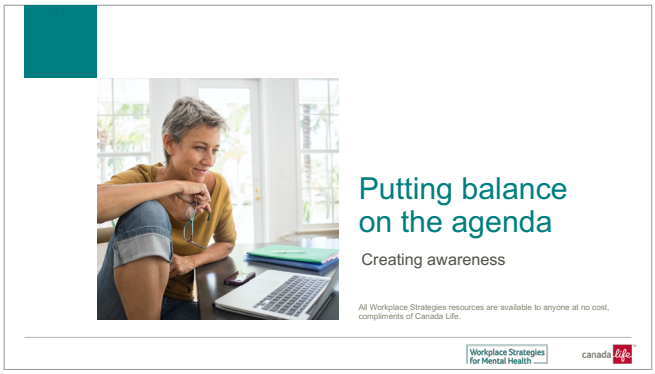
You can read this out loud as provided or personalize it for your style and audience.

Where you see text in [**square brackets**] it's a quick note to you about process. Don't read it aloud.

Transition

Each slide ends with a sentence or 2 that helps you transition to the next slide.

Slide 1 5 minutes



Putting balance on the agenda

Facilitator notes

There isn't much time for introductions in a one-hour session.
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 you're engaging the group in this discussion
- The importance of addressing psychological health and safety in your organization

Suggested wording

[If this is the group's first On the agenda workshop]

Our organization's committed to continual improvement for a psychologically safe workplace. This means you're supported to do a good job in a healthy work environment. It also means you can leave at the end of your day with your mental and physical well-being intact.

This helps you to be able to go home and effectively manage the demands of your personal and family life.

We need your help deciding how we can best accomplish this goal. How we interact with each other is as important to our work experience as the policies and programs we offer.

[If you've previously facilitated On the agenda workshops with your team:]

Thank you for coming together once again to help us improve psychological safety for our team.

Transition

The focus of this session is balance in the workplace, which includes supporting each other to be able to manage demands from work, family and personal life.

Notes

Slide 2 2 minutes



Process

Facilitator notes

If you've done an On the agenda workshop before, you can quickly show this slide and say your process will be like the last creating awareness workshop.

Suggested wording

Today's goal is to reach a better understanding of what balance means to us. Specifically, we'll explore what we want it to look and sound like in our workplace.

We'll start by agreeing to the principles of psychologically safe discussions. Then we'll review the definition of balance. This includes statements that expand on what it would look like in the workplace. We'll list words that represent balance to us. Next, we'll brainstorm specific workplace behaviours that show these words in action. We'll then choose one approach we wish to adopt and consider criteria to make sure it's successful. Our final task will be to commit to improving balance in our workplace.

Transition

Before we begin, let's agree on how we will discuss our ideas in a psychologically safe way.

Notes

Slide 3 2 minutes



Psychologically safe discussions

Facilitator notes

It's important that all participants agree to follow these guidelines for psychologically safe discussions. If this may be difficult because of existing tension or past problems, consider a seating plan to avoid cliques or confrontations. You may want to explain that everyone at work doesn't need to be your good friend, but everyone's expected to work together professionally. One way to get consensus is to ask if anyone is unwilling to honour these guidelines. No hands raised indicates implicit agreement. If you're concerned about handling a difficult situation, please see Facilitation tips for leaders.

In the suggested wording, you'll offer to speak privately with anyone who has a more serious issue. If you're not the person who can help, be clear that you'll pass this on to someone who can.

Suggested wording

We want this discussion to be psychologically safe for everyone. Today we only want to focus on constructive ideas for the future. You may have unresolved or past issues related to managing work/life balance. Anyone who's dealing with this should speak to me privately so we can take steps to help you with that.

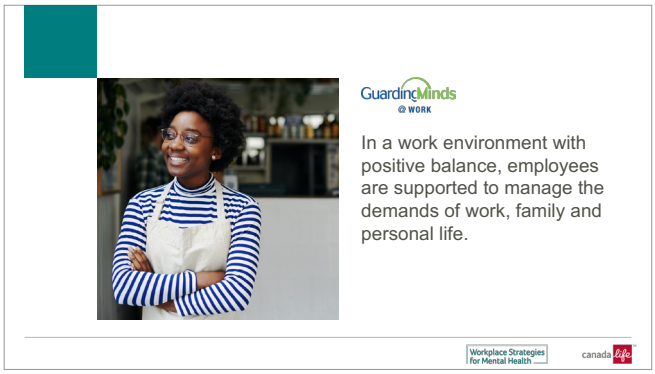
Let's be both practical and creative and come up with suggestions to improve balance for our whole team. Please don't single out any one person or group. Make sure everyone in your group has a chance to contribute to the discussion.

Transition

Let's now discuss what work/life balance means.

Notes

Slide 4 2 minutes



Describing balance

Suggested wording

Guarding Minds at Work defines “In a work environment with positive balance, employees are supported to manage the demands of work, family and personal life.”

It’s impossible to always have the exact same amount of time and energy spent on work as you do on your personal life. That’s not what balance is about. Balance is about each of us optimising our energy across our week and in each moment. That means that while we’re at work, we’re focused and doing the best we can at our jobs. It means when we’re with our family and friends, we’re focused and doing the best we can to connect with them. It also means we fulfill our personal obligations effectively.

Your contribution to balance is taking care of your mental and physical well-being and the quality of your relationships. Our task today is to determine what can contribute to your ability to maintain balance at work.

Transition

According to the research from Guarding Minds at Work, a workplace that supports balance would be able to state that:

Notes

Slide 5 15 seconds



My employer encourages me to take my entitled breaks

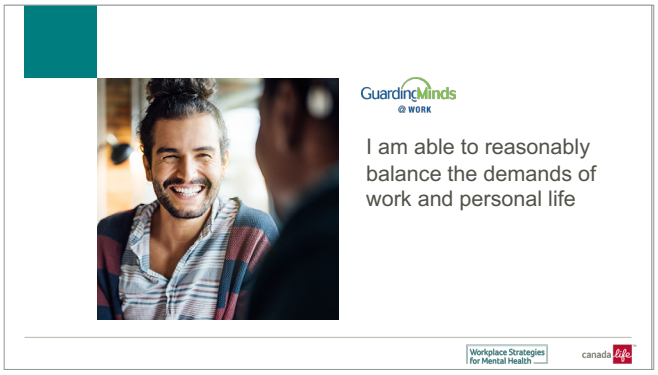
Suggested wording

My employer encourages me to take my entitled breaks. These could include:

- Lunch breaks
- Time off when you're sick
- Your earned vacation time and any other days off you're entitled to
- Parental leave

Notes

Slide 6 15 seconds



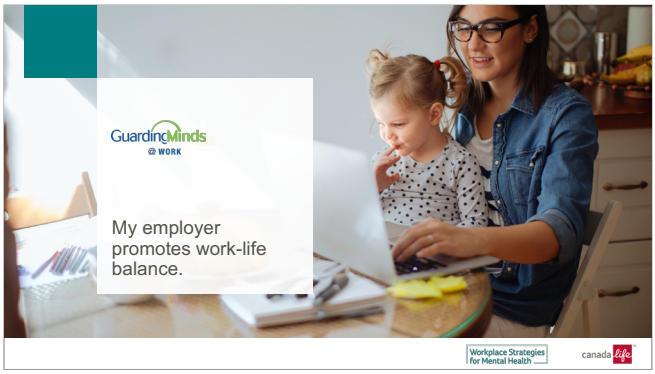
I am able to reasonably balance the demands of work and personal life

Suggested wording

I am able to reasonably balance the demands of work and personal life.

Notes

Slide 7 15 seconds



My employer promotes work-life balance

Suggested wording

My employer promotes work-life balance.

Notes

Slide 8 15 seconds



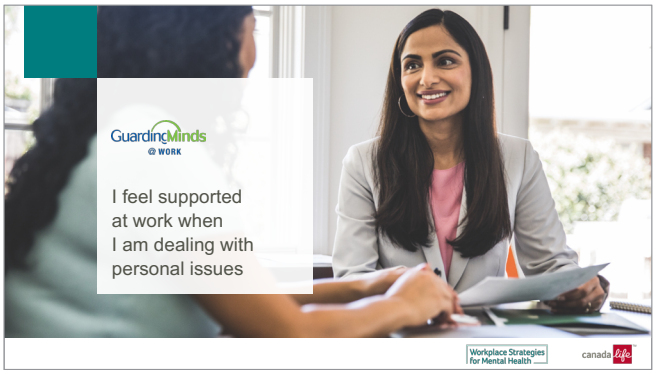
I can talk to my supervisor when I am having trouble maintaining work-life balance

Suggested wording

I can talk to my supervisor when I am having trouble maintaining work-life balance.

Notes

Slide 9 15 seconds



I feel supported at work when I am dealing with personal issues

Suggested wording

I feel supported at work when I am dealing with personal issues.

Notes

Slide 10 15 seconds



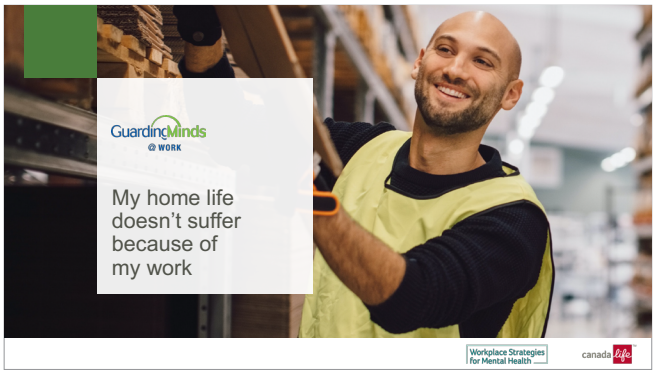
I don’t feel burned out in my job

Suggested wording

I don’t feel burned out in my job.

Notes

Slide 11 15 seconds



My home life doesn't suffer because of my work

Suggested wording

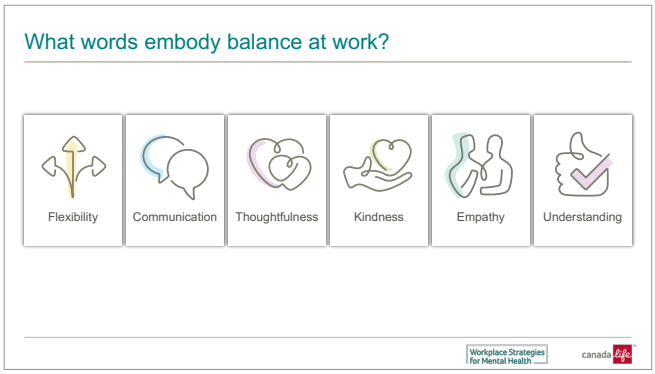
My home life doesn't suffer because of my work.

Transition

Now let's consider what support for balance in the ideal workplace might look like.

Notes

Slide 12 7 minutes



What words embody balance at work?

Facilitator notes

In this exercise allow the group to come up with any words that they want.
This is to get them thinking about what this concept means to them.

Suggested wording

In your groups, brainstorm as many words as you can that represent balance. You have 2 minutes to write down as many as you can. You can get ideas by referring to these examples on the slide, and the definition and statements in your handout.

Write one word per sticky note.

I'll let you know when time's up and ask each group to share their responses and place their sticky notes on the wall. Please start now.

[When time's up, allow a representative from each group to share their ideas as they place them on the wall.]

Transition

Thank you for these words. We'll build on them in the next activity.

Notes

Slide 13 13 minutes



Actions that improve balance at work

Facilitator notes

If some groups are struggling to come up with ideas, provide them with one or 2 from this list to get them started.

Flexibility – covering for each other when possible

Communication – asking each other how we are and really listening to the answer

Thoughtfulness – checking in to see if we can help those who are off work right now

Kindness – offering to help when someone is struggling to meet a deadline

Empathy – learning what someone's going through

Understanding – being more aware of what someone may be going through after the loss of a loved one

Suggested wording

Now let's come up with specific actions that would positively demonstrate each word you came up with in the last activity. Be creative. For example, you can have a positive impact on flexibility by covering for each other or trading off tasks when it could help in a time of need. Please write as many examples as possible with at least one action for each word. Each action should be on a separate sticky note.

You have 5 minutes. I'll let you know when time's up and ask each group to share their answers with the larger group.

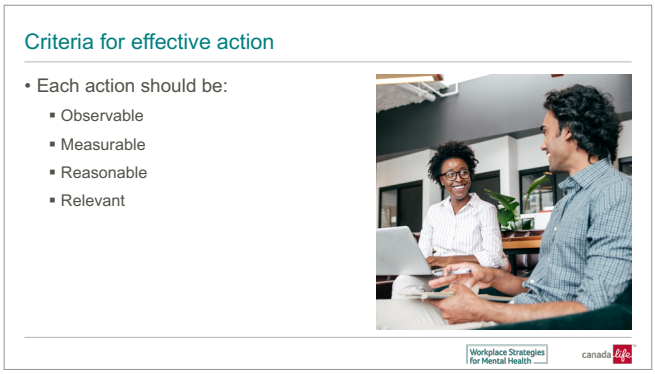
[When time's up, allow a representative from each group to discuss their ideas as they place them on the wall.]

Transition

Thank you for all these ideas. Next, let's consider what action's most likely to have a positive impact on balance.

Notes

Slide 14 15 minutes



Criteria for effective action

Facilitator notes

During this exercise you're helping the participants think more critically and practically about their ideas. When they present their ideas at the end, be sure to identify when an idea may:

- Need approval from senior leaders
- Need funding you don't currently have
- Contravene a collective agreement, policy or contract

These should be placed in a separate section as future considerations. Don't discourage those who propose these ideas. Acknowledge that they require more consideration than today's workshop allows. Suggest these ideas can be shared with senior leadership afterwards. Focus instead on the ideas that are within budget and easy to do right now.

Suggested wording

The plan for today is to think critically about these actions and choose one we agree to recommend. First, we must consider the extent to which the action is observable. This means we must be able to see or hear it. For example, let's say we agree we should cover for each other when it's possible and when there's a need. We should have a way to record who's stepping up to help and who's receiving help, so this doesn't become an unbalanced contribution.

If the action's measurable, we can establish it will make a positive difference on balance. In the example of helping someone out, it doesn't contribute to overall balance if the person doing the helping ends up burning out.

The action also needs to be reasonable. This means we have the time and resources to do it. Let's look at the example we're using. You may be kind-hearted and want to help everyone but that's neither fair nor balanced. You also may be someone who's not adequately trained to do your job effectively and is always seeking help. That's not fair

or balanced either. We need to put safeguards in place to protect against either of these possibilities.

Finally, the action needs to be relevant to our work environment. Continuing with the example, some roles don't lend themselves to this approach. It may be that your skillset is unique to you, or it may be that when you need help, no one else is available. Let's consider any of those limitations and try to come up with actions that are relevant to the greatest number of our team members.

Let's stay with our example and incorporate our criteria. Our recommended action would be to set up a system where each person who receives help from a co-worker would report back to our leader. The leader would be responsible to express recognition for appreciation to the person who's helping. The leader would also create a record of the person's contribution. This would make the action both observable and measurable. To make it reasonable and relevant the leader would monitor individual contributions of all team members and determine the fairness for all. Lack of experience and volume of work could prevent some people from being able to help. Fairness doesn't mean identical contributions. This would be a complete single action using the criteria on the slide. Of course, it's only our recommendation and it would have to align with organizational policy and/or get approval from senior leadership.

In your groups, compare the actions you came up with against these 4 points. Use the worksheet in your handout to refine your actions. Make sure they include each of the criteria.

Choose your top one to 3 actions to present to the larger group. You have 5 minutes starting now.

[**After 5 minutes**]

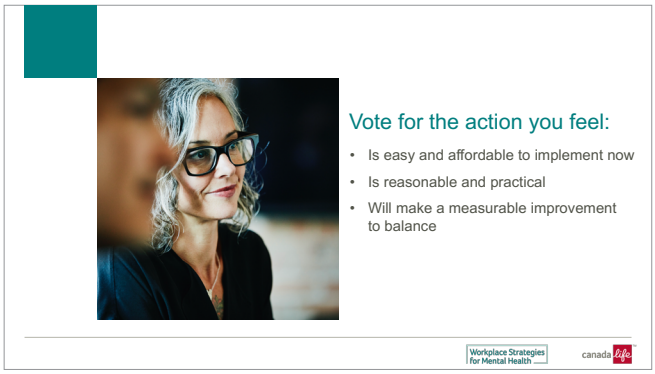
Each group can now present their chosen actions. If another group chose a similar idea, you can share that you agree and only describe any differences.

[**You'll want someone to record these on a flip chart or post them on the wall because the group will be voting on the action to take first. As you go through the ideas, point out which ones would need approval or funding or may go against policies or contracts. Place these ideas in a separate section for future consideration. Be sure to collect the ideas or take a picture of them. Then, you can record and share these with leadership or review them later to explore what's possible.**]

Transition

Those are some great ideas. Next, we're going to vote on which action we'd like to adopt for our workplace.

Slide 15 7 minutes



Vote

Facilitator notes

You may choose from among these ways to vote on the first action to recommend:

1. Provide one to 3 small stickers to each person. Explain they can place one, 2 or 3 of the stickers on the actions they most want to see recommended.
2. Ask them to put a check mark or sticky note on the action.
3. Number the displayed actions, grouping similar ones together. Ask them to write their vote on paper and place it in a container.
4. Use online polling technology if you're delivering this remotely.

In all cases, the action with the most votes wins. We don't recommend a show of hands because the peer pressure may be too great.

Suggested wording

Today, we're looking for a quick win. You'll now vote to recommend one action you believe will best improve balance in our workplace now. The action must meet these criteria:

- Is low cost or no cost
- Is easy for everyone to adopt
- Doesn't violate any organizational policies or contracts
- Impacts balance positively

Other actions you've come up with could form part of our continual improvement approach. We can seek funding and approval as necessary for those actions.

Each proposed action will be displayed for you to review over the next 2 minutes, so you'll be ready to vote. Please remember you're choosing based on what you feel:

- Would make a difference
- Is low cost or no cost
- Doesn't need approval
- And is relatively easy for everyone to adopt

Does anyone have any questions?

[**Field any questions and then explain the voting method you'll use and facilitate the vote. There are options described in the Facilitator notes above.**]

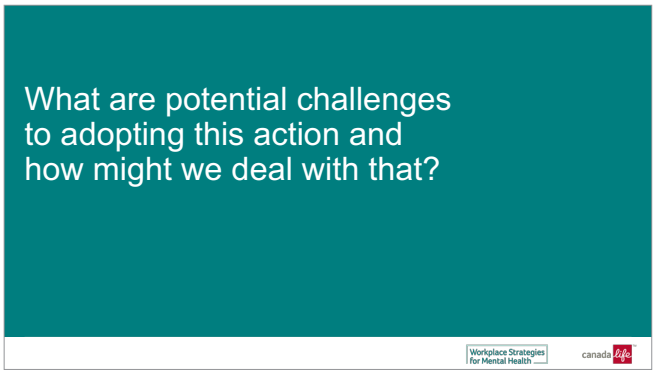
We now have a winner and it is [**read it aloud**]. Remember that the other actions can also be considered later.

Transition

Now that we have our action, let's explore any potential challenges.

Notes

Slide 16 5 minutes



Addressing challenges

Facilitator notes

It's nice if everyone can share, but time may not allow it. Ask for volunteers to share. This provides an opportunity to voice any concerns before recommending the action. If no challenges are shared, you can move on.

Suggested wording

Take a moment to answer this question individually in your handout on page 6. We'll go around the room and consider any potential challenges before they arise. If you're not sure how to deal with the challenge you identify, the group may be able to offer helpful ideas.

[**Provide time to complete their responses and then address any challenges one at a time. When the challenges are adequately addressed move on.**]

With the challenges addressed, we're now ready recommend our action. Does anyone need anything further before recommending this action?

[**Address any needs and if there are no needs expressed, continue.**]

Great. Thank you for that. In the coming months, we'll monitor how this action we've recommended impacts our team. Then, we'll regroup to review the results and consider next steps. We'll save all your ideas for future planning.

Transition

For those who want to learn more about psychological health and safety at work, there's a list of relevant resources at the back of your handout.

Notes

Slide 17 15 seconds



More resources

Facilitator notes

Once you've thanked the participants you can leave this slide up for those who want the website address for more free resources.

Suggested wording

I'll leave this slide up for anyone who wants to find more information on today's topic.

Notes

Workplace Strategies for Mental Health



Workplace Strategies for Mental Health resources are:

- For all employers, people leaders, employees and facilitators of workplace psychological health and safety
- Available in English and French
- Evidence- or practice-based
- Available to anyone at no cost

Examples of the resources available at clwsmh.com include:

Burnout response for leaders
How to identify employee burnout, recognize workplace factors and take pro-active steps for prevention. These strategies can help protect overachievers and those recovering from burnout.

Leader support for employees who are caregivers
Tips to support employees who are caring for loved ones remain productive and healthy. Understanding and flexibility can reduce stress at work for caregivers.

Grief response for leaders
Learn how to support your employees during loss and while at work. Effective strategies can help employees who are experiencing grief remain productive while they heal.

Helping employees manage change
Any organizational change may have an unsettling impact on employees. You can help through thoughtful planning, effective communication, and engaging employees in exploring how changes can be handled in a psychologically safe way.

Resilience
A tool to help you bounce back after a health, personal or work crisis. This resource helps you develop healthy coping strategies to deal with life's challenges.

Resources for employees
Resources to support well-being for employees and their families.

A tool to support employee success
A process that engages employee and employer to develop solutions that support productivity and well-being. Supporting Employee Success is for any employee, including those needing accommodation.

Working parents
Resources to support the mental health of working parents and children at all stages of their lives. Information to help you support your children through challenges at home, school and work.

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

Contact us through social media or at clwsmh.com

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