Workplace Strategies for Mental Health

Compliments of Canada Life



Facilitator guide

Putting clear leadership and expectations 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
- Supporting 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 clear leadership and expectations 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 have 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 will take action in your workplace.

Facilitating team discussions

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 clear leadership and expectations factor to understand how the employees responded.
- Ensure any leader whose performance may be discussed at this session has an opportunity to review the process.
- **If there are significant leadership issues involving your participants, we recommend careful discussion to ensure a productive and psychologically safe environment. In most cases it's advisable for leaders to not be present but it's still very important that conversations stay constructive and respectful.**

- Seek understanding of any unresolved issues for participants:
  - If available, review data on grievances or complaints about leadership so you're aware of existing issues related to lack of clear leadership and expectations.
  - Issues aren't to be resolved in this workshop but it's important you're aware of them. You can prevent negative outcomes by acknowledging issues exist. Then, point out this session will focus on prevention of these types of issues.
  - Ask who can help facilitate separate conversations about specific concerns at another time.
- Review any existing policies that affect or restrict management approaches at the organizational and departmental levels. This way, you'll know if any participant suggestions violate existing policy. You can still consider these suggestions. Explain you need to take them to senior leadership first.
- Find out who in your organization could help with more serious issues like bullying, harassment or conflict. This could include a resource to help them, as well as 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'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.
- 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 clear leadership and expectations.

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 report to the same leader. This engages the team in creating awareness about what clear leadership and expectations would mean for them.

You may also want to facilitate this session with just leaders. Participating in the entire workshop can help leaders improve their understanding of clear leadership and expectations. Then, they can begin to take appropriate action to improve psychological health and safety. If you run the team session first, you may want to share their suggestions with the leaders at a separate leadership session.

There's no limit on the number of participants but 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 clear leadership and expectations on the agenda: creating awareness



Improving psychological health and safety is a process of continual improvement. Everyone needs to be involved. In this session we'll discuss what clear leadership and expectations means for our team in a practical way.

There are no perfect leaders. Yet, we can improve everyone's experience at work by understanding how this team can best be supported to do their jobs successfully. Please come prepared to make a positive contribution by thinking about how your leader can best support your success 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 two 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 two that helps you transition to the next slide.

Slide 1 5 minutes



Putting clear leadership and expectations on the agenda

Facilitator notes

There isn't much time for introductions in a one-hour session. To begin, ensure that 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 is committed to continual improvement for a psychologically safe workplace. This means that 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.

We need your help deciding how we best accomplish this goal. How leaders support your success 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

This session focuses on clear leadership and expectations in the workplace, which comes down to you being able to do your job without undue risk to your psychological well-being.

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 clear leadership and expectations means to us. Specifically, we'll explore what it should 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 clear leadership and expectations. This includes statements that expand on what it would look like in the workplace. We'll list words that represent clear leadership and expectations to us. Next, we'll brainstorm specific workplace actions that show clear leadership and expectations. We'll then choose one approach we wish to recommend and consider criteria to make sure it's successful. Our final task will be to commit to supporting clear leadership and expectations 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 is 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.

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. There may be past situations where a leader has been less than perfect. We'll always have room for improvement.

Today we only want to focus on moving forward with clear leadership and expectations. There may be unresolved issues right now. Anyone who's dealing with something specific should speak to me privately so we can take steps to help you with that.

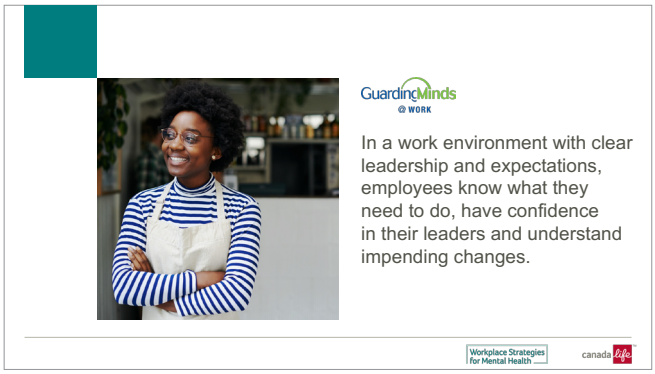
Let's be both practical and creative and come up with suggestions to improve clear leadership and expectations for our whole team. We're discussing ideas, not individuals. Please make sure everyone in your group has a chance to contribute to the discussion. Is there anyone who can't agree to a psychologically safe discussion?

Transition

Let’s now discuss what clear leadership and expectations means.

Notes

Slide 4 2 minutes



Describing clear leadership and expectations

Suggested wording

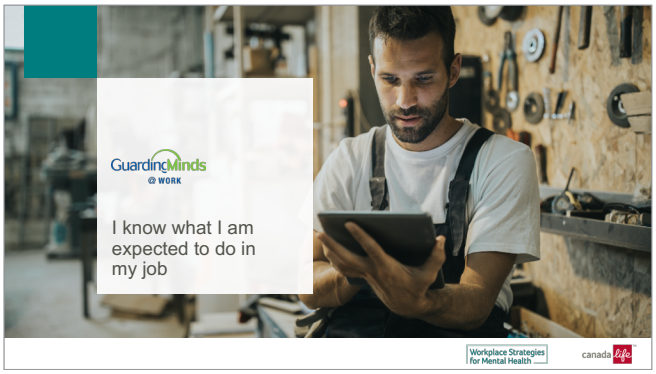
Guarding Minds at Work defines “In a work environment with clear leadership and expectations, employees know what they need to do, have confidence in their leaders and understand impending changes.”

Transition

According to the research from Guarding Minds at Work, employees with clear leadership and expectations would be able to state that:

Notes

Slide 5 15 seconds



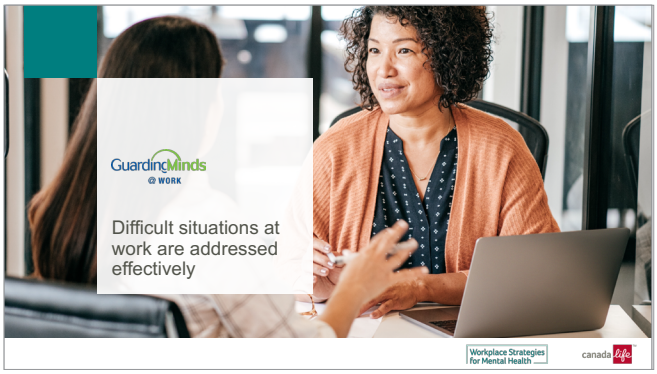
I know what I am expected to do in my job

Suggested wording

I know what I am expected to do in my job.

Notes

Slide 6 15 seconds



Difficult situations at work are addressed effectively

Suggested wording

Difficult situations at work are addressed effectively.

Notes

Slide 7 15 seconds



I am informed of important changes that may impact how my work is done

Suggested wording

I am informed of important changes that may impact how my work is done.

Notes

Slide 8 15 seconds



My supervisor supports me to do my job successfully

Suggested wording

My supervisor supports me to do my job successfully.

Notes

Slide 9 15 seconds



The reasons behind organizational changes are explained

Suggested wording

The reasons behind organizational changes are explained.

Notes

Slide 10 15 seconds



I am told about the impact of organizational change on my job

Suggested wording

I am told about the impact of organizational change on my job.

Transition

Now let’s consider what clear leadership and expectations looks and sounds like in the ideal workplace.

Notes

Slide 11 7 minutes



What words embody clear leadership and expectations?

Facilitator notes

In this exercise allow the group to come up with any words 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 clear leadership and expectations. 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.

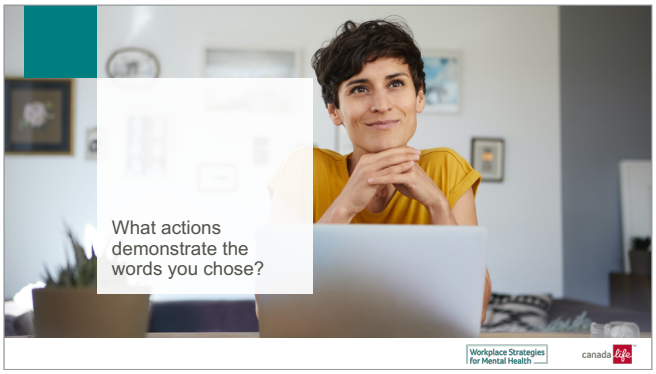
[**When the time's up, allow a representative from each group to share their ideas as they place them on the wall.**]

Transition

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

Notes

Slide 12 13 minutes



Actions that improve clear leadership and expectations

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.

Supportive – Helps me improve my performance, not just points out what I do wrong

Clear – Checks that I fully understand what's expected of me when given a new task

Reasonable – Allows time for a learning curve

Authentic – Says what they mean and means what they say

Accessible – Responds to emails within 2 business days

Fair – Is consistent in how personal time's allotted

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 practical and reasonable. Let's take "supportive" as an example. Being supportive in helping you improve performance needs to have reasonable limits. Determine how far a leader should go before it becomes an issue of discipline. Remember that allowing poor performance will eventually have a negative impact on others. In this case, you may want to have supportive conversations to help improve performance before discipline is considered. 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 the time's up and ask each group to share their answers with the larger group.

[**When the 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 is most likely to have a positive impact on clear leadership and expectations.

Notes

Slide 13 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, which means we must be able to see or hear it. Let's use our example of having a supportive conversation to help us improve performance before discipline begins. There must be a clear understanding and documentation of what's happening. A casual conversation in the hallway or a conversation without the opportunity to improve wouldn't meet the criteria.

If the action is measurable, we can establish the extent to which it makes a positive difference. If these conversations don't result in improved performance, then we'd have to revisit the strategy to make it more effective.

The action also needs to be reasonable. This means the leader needs to have the time and resources to do it and it must be reasonable for most employees. “Reasonable” means the leader has also been given adequate training to accomplish the action effectively. In a psychologically safe workplace, we’d all be supportive as the leader develops this skillset.

Finally, the action needs to be relevant to our work environment. This means it makes sense to us and everyone can adopt it. Continuing with our example, requiring these supportive conversations face-to-face may not work where employees or the leader are often off site.

Let’s stay with our example and incorporate our criteria. Our recommended action would be to have every leader use the Task improvement process provided by Workplace Strategies and available for free on their website. Complete this process before beginning any formal performance management or discipline processes. Because we have previous knowledge this is a supportive way to help someone improve, 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.

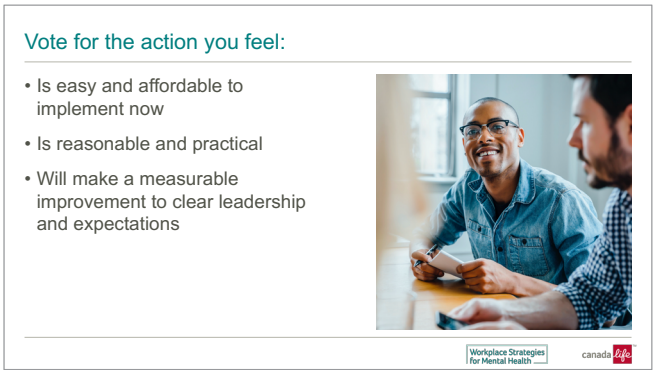
[**You’ll want someone to record these on a flip chart because the group will be voting on the action to take first. As you go through the ideas, point out which ones would need approval or funding or may go against policies or contracts. Place these ideas in a separate section for future consideration.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

Transition

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

Notes

Slide 14 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 want the leader to take. The action must meet these criteria:

- Be low cost or no cost
- Is relatively easy for the leader to adopt now
- Doesn't violate any organizational policies or contracts
- Has the impact we want to have on clear leadership and expectations

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
- Is relatively easy for the leader to adopt now

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.**]

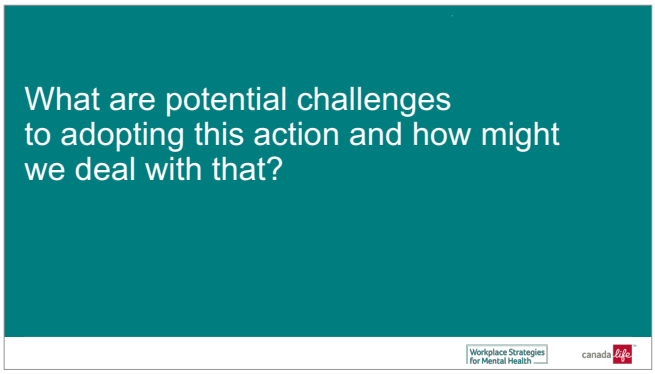
We now have a winner and it's [**read it aloud**]. Remember the other ideas can also be considered later by your leader.

Transition

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

Notes

Slide 15 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 refine the action before recommending it to the leader.

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. Remember to stay away from discussing individuals or personalities. You're tasked to come up with constructive and helpful ideas to support the success of our action.

[**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 considered, we're now ready to recommend our action.

Thank you for all your ideas today. I'll bring this recommendation to the leader and have them report back on their ability to implement it. I'll also share the other actions you've proposed for their consideration. In the coming months, we'll regroup to review the results and consider next steps. Remember that in a psychologically safe workspace, each of us needs to support the success of our leaders and each other in a psychologically safe way.

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 16 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:

Before you say no for leaders
Learn how all employee requests or behaviours are attempts at meeting a need. Learn how to ask “why” before you say “no” and get to the root of the issue.

Leadership skills
Tools for leaders to resolve workplace issues and improve psychological health and safety for all. All of the resources provided are evidence or practice-based approaches that can help.

Dealing with a stressful boss
Strategies to help employees maintain their well-being while working with a boss they find difficult. A variety of approaches for different management styles and behaviours are included.

Psychologically Safe Leader Assessment
This free resource helps leaders become aware of the impact they can have on the psychological health and safety of employees at work. It helps leaders improve communication, social intelligence, fairness and problem-solving.

Employee concerns
Guidelines and resources for employees to respond to issues about work, performance and well-being. Practical strategies and tools for a wide range of workplace and personal concerns.

Performance management
Resources for supporting performance in a psychologically safe way, even when mental health is an issue. These strategies focus on solutions that also support employee well-being.

Team building
Free and practical tools including team activities, workshop materials and facilitation tips. Help build more effective and resilient teams at work.

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

Contact us through social media or at clwsmh.com

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

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