Workplace Strategies for Mental Health

Compliments of Canada Life



Facilitator guide

Putting workload management 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 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

Introduction to the On the agenda workshop series 1

Facilitating this topic 2

How to use this guide 5

Workshop

Slide 1 Putting workload management on the agenda 6

Slide 2 Process 8

Slide 3 Psychologically safe discussions 10

Slide 4 Describing workload management 12

Slide 5 The amount of work I am expected to do is reasonable for my position 14

Slide 6 I can talk to my supervisor about the amount of work I have to do 15

Slide 7 I have the equipment, resources and time needed to do my job well 16

Slide 8 My work is free from unnecessary interruptions and disruptions 17

Slide 9 I have control over how my tasks and responsibilities are prioritizeds 18

Slide 10 What causes workload stress for you? 20

Slide 11 Actions that reduce our workload stress 22

Slide 12 Criteria for effective action 24

Slide 13 Vote 26

Slide 14 Addressing challenges 28

Slide 15 More resources 30

Workplace Strategies for Mental Health resources 32



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 workload management 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'll take action in your workplace.

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.

Slide presentations

The Creating awareness and Creating change slide presentations are available from clwsmh.ca/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.ca/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:**
  - Accurate records of hours worked
  - Paid and unpaid overtime in the last year
  - Complaints or grievances related to workload
  - Employee feedback on workload and work pace
  - Times of higher and lower demand
  - Data related to work related errors incidents, accidents and injuries
  - Work scheduling challenges
  - Delays in filling positions
  - Task specific training
- **Review any existing policies on:**
  - Hiring
  - Orientation and on-boarding processes
  - Overtime
  - Flex time
  - Scheduling
  - Processes 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.

- Consider grouping employees into categories with similar work experiences. For example, in a municipality, you could group paramedics with firefighters. And, group call centre workers with receptionists. It's not ideal to mix firefighters with call centre workers at the same table. Their experiences aren't similar. Everyone will benefit from hearing the experiences of others during the large group discussions.
- 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, 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 you're seeking constructive ways to prevent such problems in the future.
- It could be helpful to have someone available who can intervene if a participant becomes overwhelmed with this discussion. This could be someone who's available in person, online or by telephone.
- Be prepared to identify when participant suggestions might violate existing policy. You can still consider these suggestions. Explain that you need to take them to senior leadership first.
- If you'd like some tips for dealing with difficult conversations during your workshop, see Facilitating team discussions
- 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 improve workload management.

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
- **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 Facilitating team discussions for help facilitating this workshop online



Your audience

This session is suited for teams who regularly do similar tasks and want to improve psychological health and safety. Where possible, have prearranged seating by job role. This engages participants in creating awareness about how to improve workload related to their tasks.

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 only with leaders. Participating in the entire workshop can help leaders improve interactions with each other. 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 Facilitating team discussions.

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 workload management on the agenda workshop: creating awareness



Any thriving organization should have more work than can be accomplished in a day. A psychologically healthy and safe work environment allows you to do your job with the least amount of stress about work left to do. Improving psychological health and safety is a process of continual improvement. Everyone needs to be involved. This session is focused on discussing what workload management means for our team in a practical way.

We all deserve to provide a good day's work and go home with our mental and physical well-being intact. Please come prepared to make a positive contribution by thinking about how to help reduce workload stress.

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 3 minutes



Putting workload management 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 is 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.

We need your help deciding how we best accomplish this goal. How we respond to workload stress can be as important as the volume of work assigned to us.

[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 workload management, which comes down to the amount of pressure and stress we feel about the work we must do.

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 how to support positive workload management. Specifically, we'll explore what our potential workload stressors are and the kind of strategies we can implement to reduce their affect.

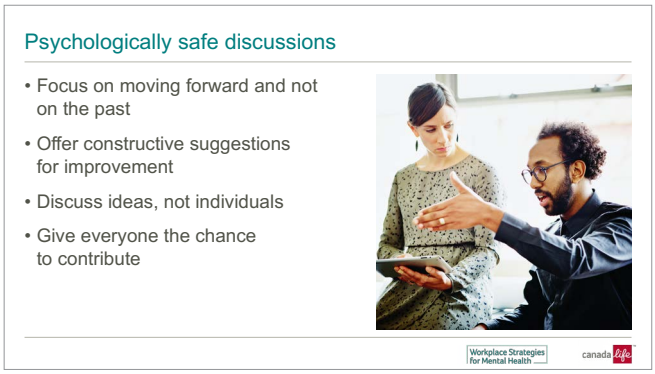
We'll start by agreeing to the principles of psychologically safe discussions. Then we'll review the definition of workload management. This includes statements that expand on what it would look like in a psychologically safe workplace. We'll list sources of our own workload stress. Next, we'll brainstorm specific actions that could prevent or reduce workload stress. Then we'll look at the actions we wish to adopt against criteria that help ensure it will be successful. We'll get to vote on the approach we want to recommend for improving workload management 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 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.

If you haven't already, ask participants to group with others whose work exposes them to similar workload stress. For example, in a municipality, you could group paramedics with firefighters. And, group call centre workers with receptionists. You wouldn't want to mix firefighters with call centre workers in the same group. Their experiences aren't similar.

Suggested wording

We want this discussion to be psychologically safe for everyone. There are certainly situations where workload management has been stressful in the past. There will no doubt be times of workload stress in the future. But today we're going to look for ways to help manage and reduce that stress going forward.

[**If you haven't already seated participants by job role, you may wish to add the following: To make this session most effective, it's ideal to discuss the same workload. If you haven't already done so, please move now to join those whose work tasks are most similar to yours. If this isn't necessary, move on to the next paragraph.**]

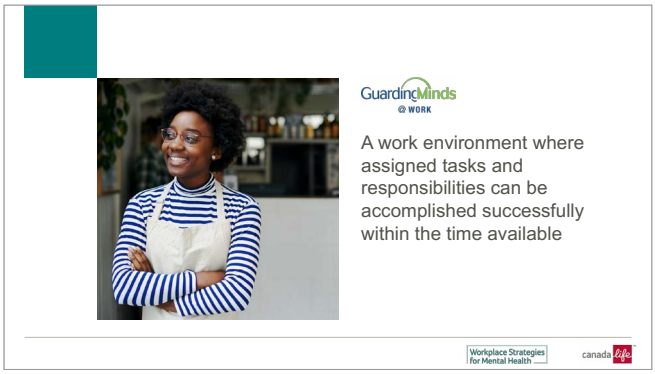
For today, let's be both practical and creative and come up with suggestions to improve psychological safety for our whole team. Please don't single out any one person or group. Make sure everyone in your group has a chance to contribute to the discussion.

Transition

Let's now discuss what workload management means.

Notes

Slide 4 2 minutes



Describing workload management

Suggested wording

Guarding Minds at Work defines positive workload management as “a work environment where assigned tasks and responsibilities can be accomplished successfully within the time available.”

This definition doesn’t mean you’ve finished all possible work by the end of your shift. It means you’re able to successfully do what’s necessary in the time available. Workload stress is often related to emotional, cognitive or mental pressures placed on an individual.

All workplaces have some level of workload stress. Examples include:

- A coffee shop during the morning rush
- A small construction firm with a huge project
- Or an accounting office during tax season

But even these unavoidable workload demands can be handled in a psychologically safe way. There are many factors that will influence the level of stress that we get from workload. We may find our work exhilarating if we’re:

- Trained
- Supported
- Interested
- And healthy

The exact same amount of work could be overwhelming if we feel

- Unprepared
- Unsupported
- Disinterested

Or if we're dealing with our own personal health issues.

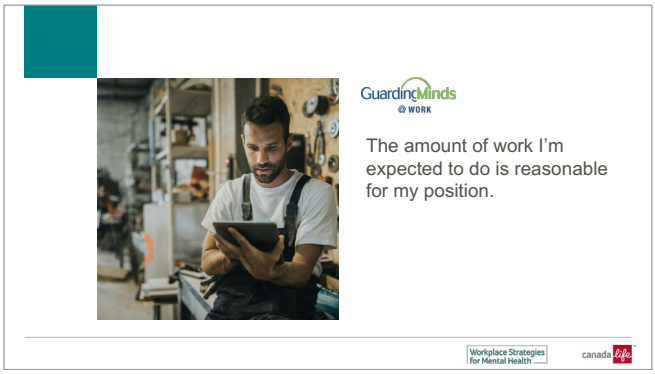
How we feel about our workload can and does change based on our circumstances.

Transition

According to the research from Guarding Minds at Work, a workplace with positive workload management would be able to state that:

Notes

Slide 5 15 seconds



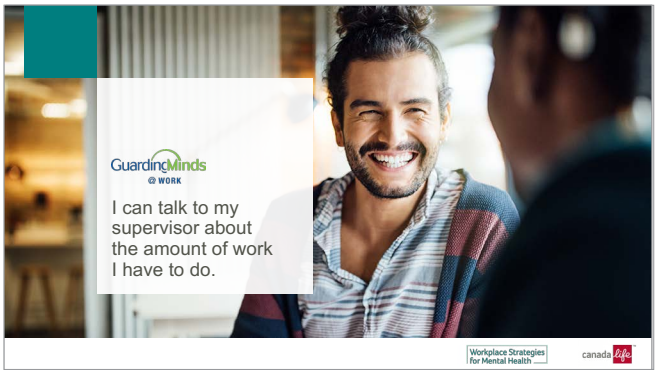
The amount of work I am expected to do is reasonable for my position

Suggested wording

The amount of work I am expected to do is reasonable for my position.

Notes

Slide 6 15 seconds



I can talk to my supervisor about the amount of work I have to do

Suggested wording

I can talk to my supervisor about the amount of work I have to do.

Notes

Slide 7 15 seconds



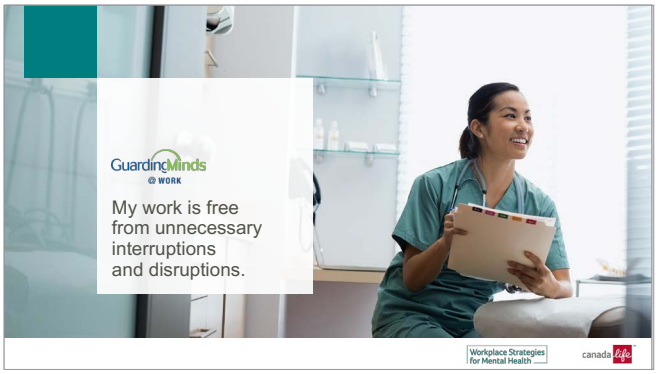
I have the equipment, resources and time needed to do my job well

Suggested wording

I have the equipment, resources and time needed to do my job well.

Notes

Slide 8 15 seconds



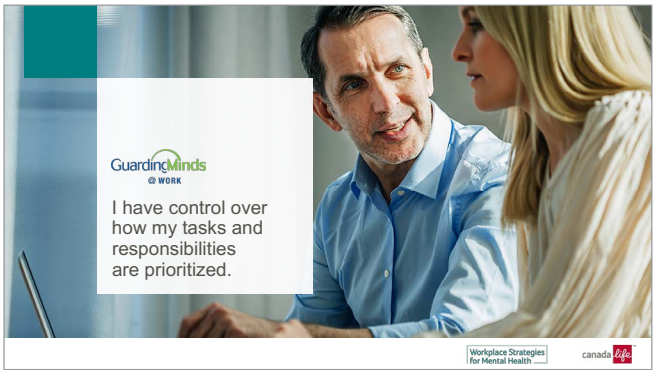
My work is free from unnecessary interruptions and disruptions

Suggested wording

My work is free from unnecessary interruptions and disruptions.

Notes

Slide 9 15 seconds



I have control over how my tasks and responsibilities are prioritized

Suggested wording

I have control over how my tasks and responsibilities are prioritized.

Transition

Now let’s consider what workload management looks and sounds like in the ideal workplace.

Notes

Slide 10 4 minutes



What causes workload stress for you?

Facilitator notes

In this exercise allow the group to come up with any words or phrases they want. This is to get them thinking about what workload stress means to them.

Suggested wording

When we're experiencing overwhelming workload stress we may feel:

- Exhausted
- Distracted
- Overwhelmed
- Pressured
- Or frustrated

We may fear letting people down.

We may fear being criticized or judged by our peers or leaders.

We may even fear the loss of our job.

In your group, you'll brainstorm as many words as you can that identify causes of workload stress for you. Please don't name names even if your workload stress comes from one person in particular. We're looking for solutions, not blame. You have 2 minutes to write down as many causes as you can. You can get ideas by referring to the examples on the slide and the definition and statements in your handout.

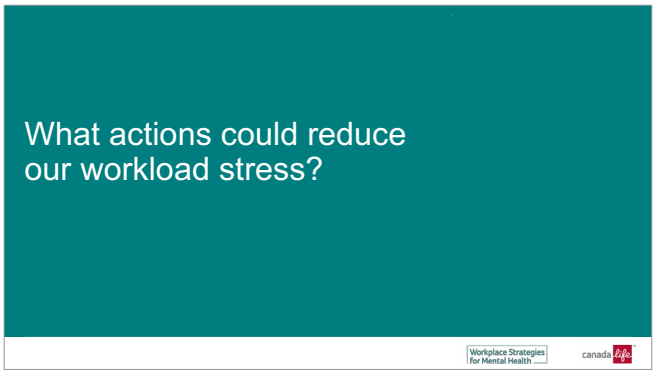
Write just one to 3 words per sticky note.

Transition

Thank you for identifying these workload stressors. We'll now look at how we might be able to improve them or our ability to deal with them.

Notes

Slide 11 13 minutes



Actions that reduce our workload stress

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.

- Deadlines
- Overtime
- Conflicting demands
- Unclear expectations
- Inadequate resources
- Criticism

Please review the suggested wording carefully before you begin to ensure the examples are relevant to your audience. Modify or omit any that aren't appropriate.

Suggested wording

One action that could reduce your workload stress is to have little or no work. But that also puts us at risk of not having a source of income, which could be stressful. What we're looking for today are ways for us to do our work in a way that's less stressful. For example:

- To deal with stressful deadlines, we may want to spend more time upfront making sure the deadlines are reasonable.
- If too much overtime is exhausting us, we may want a process to prioritize the work we need to do in regular work hours. Then, the choice whether to work overtime is easier to make.
- If conflicting demands are stressing you out, it may help to try to focus on one task at a time with limited distractions.
- If expectations aren't clear, you can write out what you believe they are. Then, ask your leaders to confirm if there's anything further required. This may help prevent misunderstandings and alleviate your stress.

- If you're waiting for resources, including the work of a co-worker, you could put this in writing to your leader and ask what you should be doing in the meantime.
- If your stress comes from fear of criticism from your leader you may want to complete the Feedback preferences resource at the Workplace Strategies for Mental Health website and share it with them. This can help them provide feedback to you in a less stressful way.

Now let's come up with specific actions to provide the improvement or support you need to reduce workload stress. Try to get an action for each workload stressor that you came up with in the last activity. Be creative and specific. For example, if you're recommending a different approach to feedback be specific about the approach. If you're recommending a different approach to deadlines, describe what would work for you. Please write as many examples as possible. Include at least one specific action for each workload stressor. Each action should be on a separate sticky note.

You have 5 minutes. I'll let you know when the time's up.

[**After 5 minutes or when everyone appears to be done, continue.**]

Now that you've come up with some solutions please share them in your group to identify one to 3 ideas that would be helpful to most of you. When you're done, please stick the rest of your ideas on the wall. These will still be considered as part of our continual improvement process, but we'll prioritize the ones you identify as being most helpful to the most people now.

You have 5 minutes. I'll let you know when the time's up.

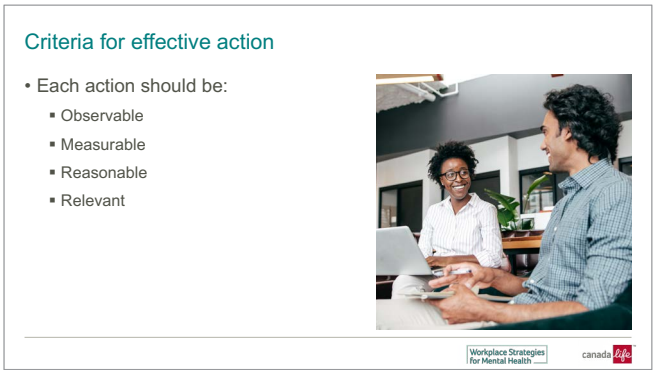
[**After 5 minutes or when everyone appears to be done, continue.**]

Transition

Now that you've identified your preferred solutions, we'll refine our actions to meet some specific criteria.

Notes

Slide 12 20 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 the actions you want 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. For example, let's say we recommend regular priority-setting meetings. To make it observable, the priorities that have been set would be in writing by the leader for the employee.

If the action is measurable, we can establish it will help reduce our workload stress. In our priority setting example, we could do baseline testing of our current levels of workload stress. Then test again after 3 or more priority setting meetings. This would help us to understand if the approach was effective.

The action also needs to be reasonable. This means it still allows us to effectively do our jobs and meet our goals. It also means we have the time and resources to do it.

In our example, the priorities should help us to focus on what's most important to our leader while still allowing us to complete our necessary work. The purpose of priority setting is to reduce our stress and ensure the leader recognizes our entire workload.

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, if we do assembly line work, there may not be a need to set priorities. Make sure your recommended action makes sense for your work situation.

Staying with our example and incorporating our criteria, our recommended action would be to:

1. Do a baseline measurement of workload stress for each employee.
2. Set up regular priority setting meetings between each employee and their leader.
3. Require each employee to have a list of workload tasks to review with the amount of time that each task will take.
4. Have the leader choose what's most important and what should be let go because it isn't possible in the time allotted.
5. After 3 meetings, assess workload stress again to determine the effectiveness of this approach.

This would be a complete single action using the criteria on the slide. Of course, it's only our recommendation. It would have to align with organizational policy and/or get approval from senior leadership.

In your group, work together to refine the one to 3 actions you chose using these 4 points. Use the worksheet in your handout to refine your actions. You each have one. When you're done, you'll be sharing your refined actions with the larger group.

You have 10 minutes starting now.

[**After 10 minutes or when everyone is finished**]

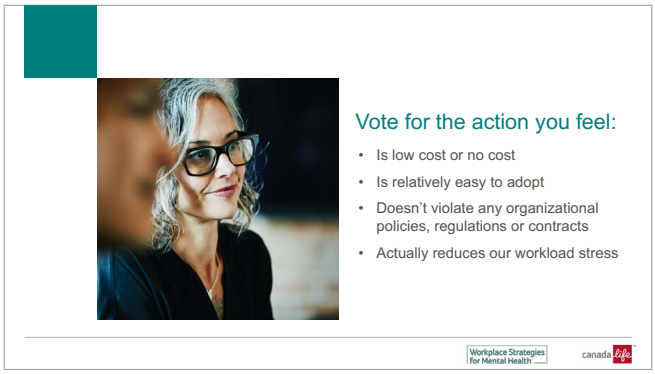
Each group can now present their chosen actions. If another group chose a similar idea, you can share that you agree and only describe any differences.

[**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 for improving workload management.**]

Transition

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

Slide 13 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 reduce our workload stress. The action must meet these criteria:

- Be low cost or no cost
- Be easy for everyone to adopt
- Not violate any organizational policies, regulations or contracts
- And, will actually reduce our workload stress

Other actions you have come up with will be considered as 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.**]

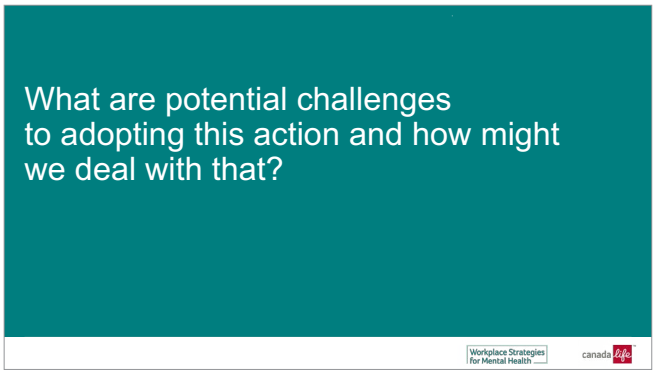
We now have a winner and it is [**read it aloud**]. Remember that the other actions can also be considered later.

Transition

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

Notes

Slide 14 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 just 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 we make this decision?

[**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 15 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:

Managing co-worker reactions to accommodation
Strategies to deal with employee fears, concerns or resentments about their co-worker's accommodation. Unresolved issues can impact the success of disability accommodation.

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.

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.

Developing employee plans for leaders
Step-by-step guidelines to collaborate with an employee to develop their own strategies for success.

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.

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.

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.

Why blame and shame don't work for leaders
Blame and shame are ineffective in motivating desired behaviours and often actually backfire. Read more to learn how to avoid emotional reactions and better support employees.

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

Contact us through social media or at clwsmh.com

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