Workplace Strategies for Mental Health

Compliments of Canada Life



Facilitator guide

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



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 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.
Learn more about psychological health and safety.

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. If you have the results from the Guarding Minds survey, you can use them to help guide your plans.

This workshop is helpful even if you haven't completed the Guarding Minds survey. Your group can align evidence-based approaches with employee input from the Creating awareness workshop. This helps to ensure your plan of action is both accepted and effective in creating sustainable change.

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

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

- For smaller businesses or independent teams, it's possible to run the Creating awareness workshop and the Creating change workshop on the same topic on the same day. This is possible when decisions about budget, resources and policy are within the authority of the leader participating in the workshop.
- In all other situations, we recommend the ideas and comments from the Creating awareness workshop be compiled anonymously and presented to the decision makers before beginning the Creating change workshop.
- **Before beginning this workshop, ask for clarity from the decision makers about:**
  - **Budget**
  - **Resources**
  - **Policy constraints for proposed plans or changes related to this topic**

Even if the decision makers participate in the session, having these criteria established in advance will allow the session to focus on the development of solutions rather than discussion about limitations.

- Once the comments and ideas from the Creating awareness workshop on this topic are approved, add them to the handout for this workshop. Ensure the comments are aggregated and anonymous. Also comment on any ideas from Creating awareness that have been implemented or are in development.

The following information was included in the Creating awareness facilitator guide. If you've recently facilitated that workshop, you may not need to repeat this preparation.

Before you begin:

- If you've done the Guarding Minds at Work survey or organizational review, have the results available. You may want to share these at the beginning of the session.
- Read through the Creating change process document in the appendix of this facilitator guide to understand what you're asking the participants to do. Make any changes to better suit your organizational needs or approach.
- Make any changes you want to the participant handout and send it out with the invitation to this session. Sample wording is found on page 4. It will help you manage time more effectively if participants are familiar with the intention and process of this session.
- If available, review any existing policies at the organizational and department levels on:
  - Scheduling
  - Personal time
  - Work from home
  - Family leave
  - Personal phone calls during work time
  - Family emergency response
  - Caregiver responsibility

  This way, you'll know if any participant suggestions violate existing policy.
- If available, review data related to:
  - Personal leaves
  - EAP and health plan utilization
  - Reports of burnout
  - Casual absenteeism

  This helps you recognize issues that may relate to a lack of balance.
- For tips on 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.
- Ensure you're aware of any limitations in terms of employee time, organizational budget or any other constraints for this project.

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 Facilitation tips for leaders for help facilitating this workshop online



Your audience

This session should include decision makers who are able to authorize a plan of action to improve psychological health and safety. These may be different decision makers from other workplace stakeholders. Employees, leaders and union representatives can all contribute to a plan for improving balance.

Some groups will look at organization-wide change. These groups may want to pay special attention to the additional actions that may require organizational authorization. These actions are found on the list of Evidence-based actions for creating change in balance in the appendix of this guide and in the participant handouts. These additional actions include policy and organization-wide strategies.

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 print them.

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

Promoting this workshop

You may use or change the following description to reach out to potential participants:

Mail

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

Putting balance on the agenda workshop: creating change



You're invited to contribute to the development of a plan for continual improvement of balance in our workplace. Before we begin our work, please review the entire participant handout **[either embed the handout here or attach it to the email]. Your familiarity with the evidence-based actions and the Creating change process will allow us to be most efficient during our time together.**

This session builds on the ideas our employees provided in our Creating awareness workshop.

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 2.5-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

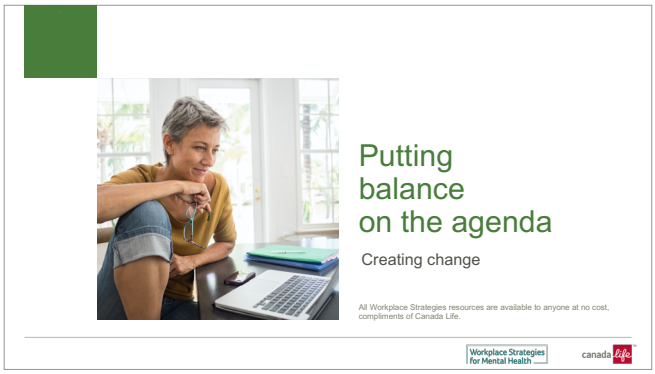
You can read this out loud as provided or personalize it for your style and audience.

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

This workshop should follow the Creating awareness workshop. If you have the same participants, introductions may not be required.

We recommend you share the collected and anonymous comments and ideas approved by senior leadership from the Creating awareness workshop with the invitation. If possible, share outcomes from that first workshop. Include changes individuals or teams have implemented.

This audience may include members from the Creating awareness workshop. You could ask them to share their experience with balance at work since that workshop. This can include changes in behaviour or strategies.

If you've completed the Guarding Minds survey or organizational review, you may want to share these results now. The employee and leader responses can help guide the decisions made in this workshop.

Suggested wording

The National Standard of Canada on Psychological Health and Safety in the Workplace states that meaningful employee participation is critical to our process of continual improvement. In our Creating awareness workshop, we invited employee input that will inform this planning session. We have included a handout with comments and ideas shared in that session. Senior leadership has approved these in principal for our review today.

The expectation is that you've read through the participant handout in advance so you're familiar with both the Creating change process and the evidence-based actions.

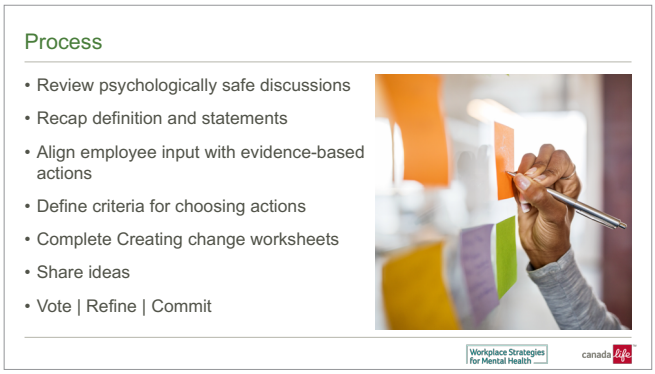
This session is intended to formalize an action plan for improving balance that builds on the employee input. We'll align the evidence-based approaches with consideration for any policy or budget constraints.

Transition

Here's our process.

Notes

Slide 2 2 minutes



Process

Facilitator notes

If all your participants recently attended a Creating change workshop, you could show this slide and briefly say your process will be like the last workshop. All are similar.

Suggested wording

Today's goal is to create a concrete plan for practical and evidence-based change. To do so, we'll:

- Agree on psychologically safe discussions
- Do a brief review of the Guarding Minds definition and statements
- Align our employee input with evidence-based actions
- Apply criteria for choosing actions to implement
- Complete worksheets, in small groups, on the actions you feel will be most beneficial
- Share those actions with the larger group
- Vote to prioritize our actions
- Refine our top priorities
- Commit to our success by deciding who will help implement

Transition

Let's review how we'll discuss our ideas in a psychologically safe way.

Notes

Slide 3 3 minutes



Psychologically safe discussions

Facilitator notes

If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

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's expected to work together professionally. One way to get consensus is to ask if anyone's 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

In the Creating awareness workshop, we discussed psychologically safe discussions. Let's continue with this approach.

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.

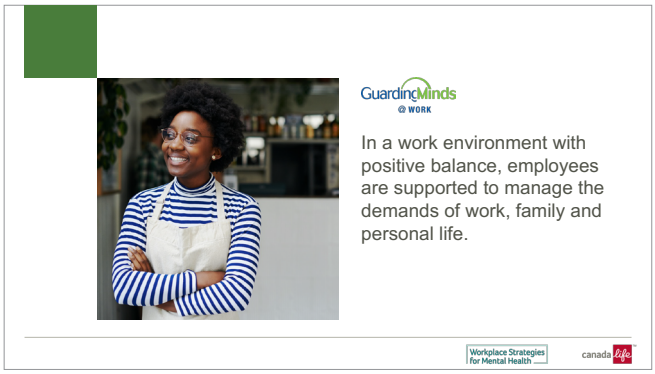
We'll always have room for improvement. Let's be both practical and creative and come up with suggestions to improve work-life balance for our whole team. Please don't single out any one person or group. Make sure everyone in your group has a chance to contribute to the discussion.

Transition

Let's now review what work-life balance means.

Notes

Slide 4 2 minutes



Describing balance

Facilitator notes

If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

Suggested wording

Guarding Minds at Work defines positive balance as "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 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 optimizing 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 effectively fulfill our personal obligations.

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 break

Facilitator notes

If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

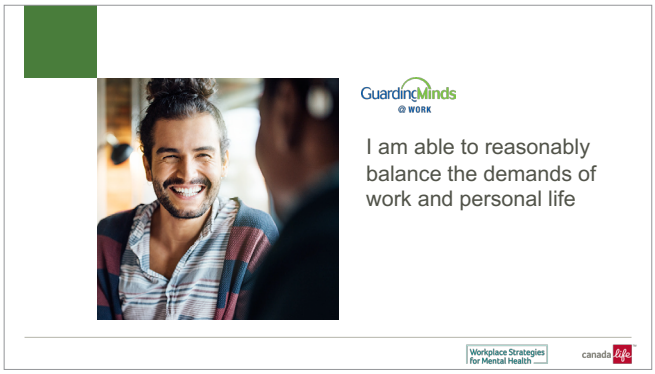
Suggested wording

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

Facilitator notes

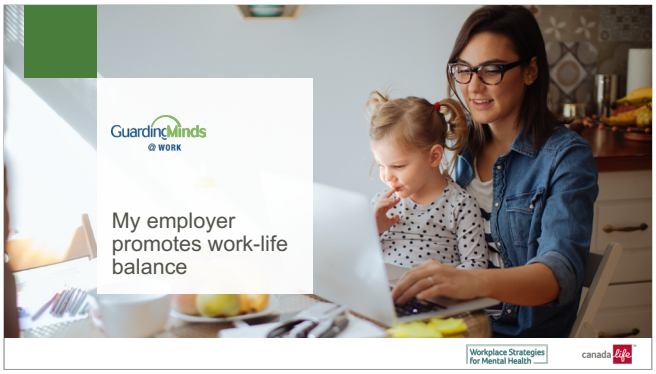
If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

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

Facilitator notes

If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

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

Facilitator notes

If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

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

Facilitator notes

If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

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

Facilitator notes

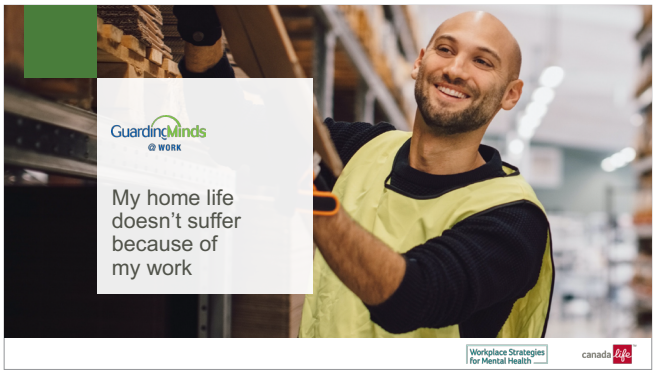
If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

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

Facilitator notes

If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

Suggested wording

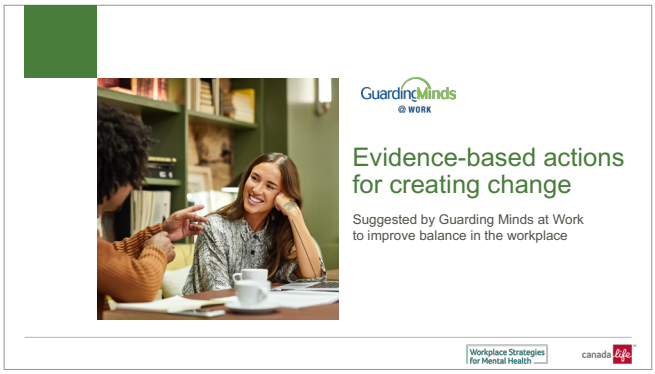
My home life doesn't suffer because of my work.

Transition

Now let's look at what the research says can positively impact balance.

Notes

Slide 12 6 minutes



Evidence-based actions for creating change

Suggested wording

Please take the next 5 minutes on your own to compare our employees' ideas from the Creating awareness workshop with the Evidence-based actions for creating change in balance. This is in your handout on page 4. Look for ideas that support both the evidence-based and the employee ideas. Be creative so we can honour the voice of our employees and ensure our approach is rooted in evidence.

Please put a check mark beside up to 3 evidence-based suggestions you feel best honour the employee feedback and have the most positive impact in our workplace.

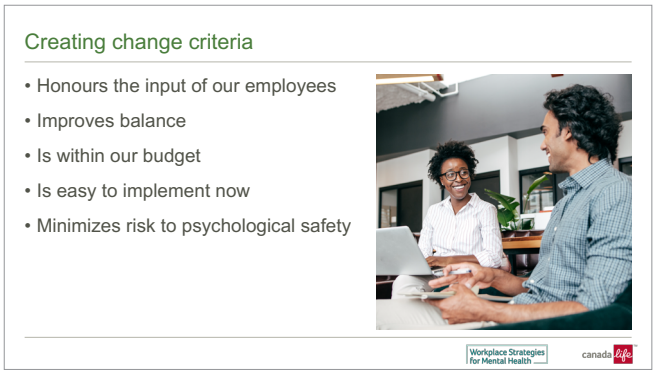
[**Once the time's up**]

Transition

Before we begin to narrow down our options, I want you to keep these criteria in mind when prioritizing the actions.

Notes

Slide 13 12 minutes



Criteria for effective action

Facilitator notes

If you haven't already shared any constraints due to budget, resources or policy, now's the time to include them. This information should have come from the decision makers and should guide this part of the process.

Suggested wording

We want to ensure our actions:

- Honour the input of our employees
- Will improve balance
- Are within our budget, which is [**share the actual amount available**]
- Are easy to implement now [**share any other constraints**]
- Minimize the risk to psychological safety for all employees.
  Think about any unintended consequences of the action you choose.

Keep these criteria in mind. Now, please take 10 minutes in your group to choose up to 3 evidence-based actions from Guarding Minds at Work for creating change in balance. Each person can share what they picked and why.

If your group feels strongly that one action is the best option to meet our goal of improving balance – and we can do it within our budget – you can concentrate on that action only. For example, you may feel we need a process to come up with our own Respect in the workplace agreement. If your group is less sure it will meet our criteria or have others you want to put forward, please do.

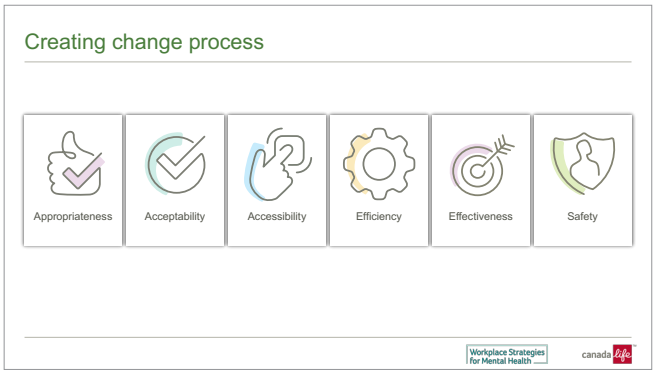
[**After 10 minutes**]

Transition

Next we're going to refine your choices by following the Creating change process.

Notes

Slide 14 60 minutes



Creating change process

Facilitator notes

This is the main work of this session. Encourage participants to be as detailed as possible. This will allow you to take their plans and offer them for implementation without a lot of additional effort. Be available to the participants to assist them with answers about budget, resources and other decisions.

You need to have decided the budget you can invest in this action. If you have no budget at all, share that with the team. Many evidence-based actions are free and take only time and effort of the team.

As the plans are shared:
You also may need to eliminate any proposed plans you know aren't currently practical. For example, they may violate the collective agreement or organizational policies. Or, they may need further investigation. Explain you're not rejecting them. They could be considered later. They're just not going to qualify for voting in the next step.

Suggested wording

This process is also adapted from Guarding Minds at Work. You can use the Creating change process and worksheet that are included in your handout.

In this step, I want your group to be as specific as possible. For example, if your evidence-based action is to provide training, include:

- The type of training
- By whom
- When
- Where
- How often
- Who's included
- And other considerations

If your group chooses more than one action, please fully complete one worksheet at a time. This way if we run out of time you'll have at least one action to present to the rest of the group. Each of you has a worksheet in your handout. Use one for each action you want to propose.

Before you begin, let's review the worksheet process.

You can refer to the Creating change process to guide you at any stage. It's also in your handout. Fill in **Group members** with the names of everyone in your group. Fill in today's date. Describe your action in the section below that. Try to keep it short but provide enough detail so anyone would understand your intent.

Next, you'll fill in each of the sections that begins with appropriateness. If you have questions about any of them, feel free to call me over to help. You'll look at:

Appropriateness: the degree to which the action's relevant to our work situation and good for our organization.
Acceptability: the degree to which the employer, union if applicable, and employees would agree to implement the action.
Accessibility: the degree to which everyone can participate regardless of ability or location.
Efficiency: the degree to which we have the resources to implement and sustain the action.

[**If you have a budget, share the amount.**]

Effectiveness: the degree to which the action will have a positive measurable impact and lead to the intended outcomes. See the Creating change process for some ways to measure success. Choose one or more for your plan.
Safety: the degree to which all potential risks to both physical and psychological safety are eliminated or managed.

Your task is to take one action and complete the worksheet by considering each of these criteria. Remember to be specific in your action. Refine it as needed to meet the criteria. If you feel it will be too complicated to do so, switch to one of the other actions your group chose.

Be prepared to share your plan with the larger group. Once we've have heard all of your plans, we'll vote on which actions we'll choose to implement first.

I'll give you 30 minutes to complete one or more worksheets by following the Creating change process. If you have any questions or feel stuck, please feel free to call me over.

[**After 30 minutes**]

Now let's have each group present the plan they feel will be most effective. If we have time, we'll also present on any other plans you've developed, but let's have each group present one at a time.

[**Write each plan title on a whiteboard, flip chart or a shared online document so the ideas are visible to each participant for voting.**]

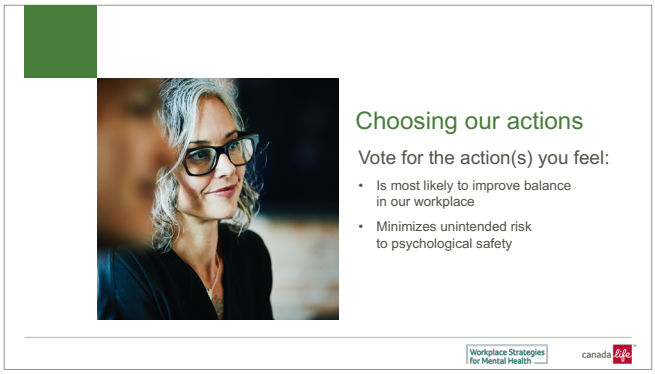
[**After each group has presented**]

Transition

Thank you for all the great ideas. Next, we're going to vote to prioritize the plans and decide what we want to implement first. After we've chosen, we'll discuss how we can refine this action before it's implemented.

Notes

Slide 15 13 minutes



Choosing our actions

Facilitator notes

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

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 adopted.
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.

Suggested wording

Over time, we'll look closely at all proposed plans and implement those that will improve balance. Today, we're looking to prioritize a quick win by immediately striving to take action that will make a positive difference. Each of you'll vote on the action you feel will best improve balance and won't put the psychological safety of anyone in our workplace at risk.

[**Explain now why any plans don't qualify to be part of the vote.**]

We'll display the proposed plans for you to review over the next 2 minutes, so you'll be ready for the vote. Do you have any questions about the criteria before we begin the vote?

[**Field any questions. Then explain the voting method you'll use.**]

[**After the vote**]

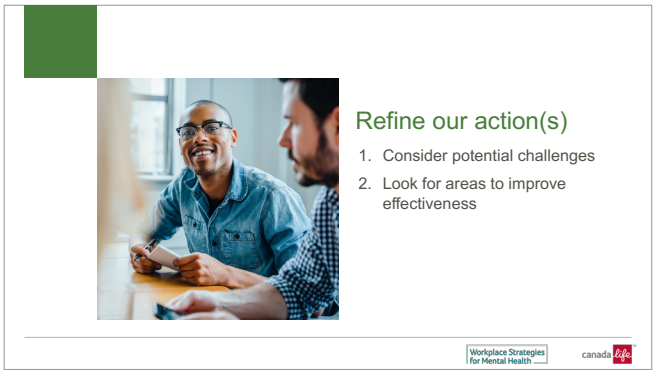
The idea we've chosen to implement first is [**state the idea that won**] and the others have been prioritized according to the number of votes they received.

Transition

Thank you all again. Our next step is to consider how we might improve this action.

Notes

Slide 16 13 minutes



Refining our top action(s)

Facilitator notes

At this point you want the group to refine the chosen action by considering any challenges or opportunities to make it better. You or someone you delegate should record all the ideas so the final proposed action plan will be as complete as possible.

Suggested wording

Now I'd like each of the people who developed this action to join another group so you can share the rationale. Others will discuss how to improve upon it. Begin with a discussion of potential challenges. You have 2 minutes to list as many as you can think of starting now.

[**Let them know when 2 minutes is up.**]

Your next task is to address each challenge by coming up with ways to improve the plan. You have 5 minutes and I'll let you know when the time's up. Have someone ready to share your ideas.

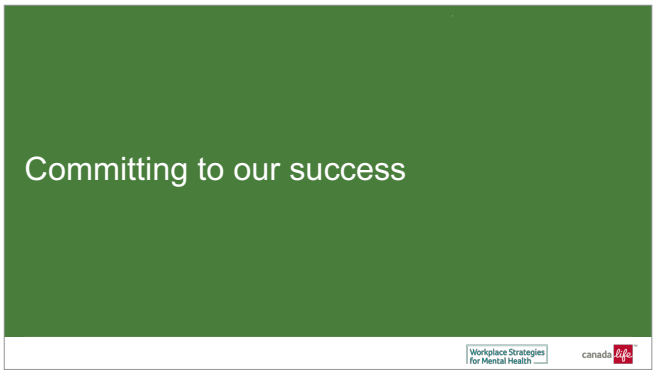
[**Let them know when 5 minutes is up and ensure you or someone else is ready to record the answers.**]

Let's now look at how we can make our preferred action even better. Who wants to go first?

[**After all suggestions are heard and the plan has been updated, move on to the next slide.**]

Notes

Slide 17 15 minutes



Committing to our success

Facilitator notes

The intention here is to assign names to the steps required in your action plan. This allows those who'll take the plan forward to have a potential working group ready to go. At the end of this, you'll hand over the following to whoever's assigned to lead the project:

- All action worksheets – including those that didn't meet the criteria
- The Committing to our success worksheet with the names recorded

Suggested wording

Let's now consider who'll contribute to the success of our action plan. Begin with filling in your own name where you'd like to participate. Then with your group, consider who'd be the most appropriate person or group of people for the other tasks. In your handout there's a form called Committing to our success.

You have about 5 minutes to complete the form in your group. Then we'll take up the answers to see if we can agree on who'll take on which responsibility.

[**Provide time to complete their responses and then facilitate a conversation while you complete a final approved form with names assigned. This now becomes a more detailed role assignment list. Once you've completed the list, you can continue.**]

Of course, we'll circle back to every person on this list to ensure the assignment can work for them. Our next step will be to hand over the work you've done today to this working group for implementation.

Transition

Thank you for your participation today. For those who want to learn more about psychological health and safety, there's a list of other relevant resources included at the back of your handout.

Notes

Slide 18 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

Appendix

Evidence-based actions for creating change in balance
Adapted from Guarding Minds at Work

For an up-to-date list of actions, visit Evidence-based actions for balance.

Ensure leaders model positive work and life balance behaviour.

- Ensure messaging from leaders and management is consistent with their demonstrated behaviour or expectations.
- Provide training for managers and supervisors so they can support both themselves and their employees to manage work and life demands.

Consider organizational amenities and events that support balance.

- Provide healthy opportunities, such as on-site fitness space.
- Encourage the use of allocated time off and breaks by sharing Healthy break activities.
- Support employees who wish to share non-work-related accomplishments, such as:
  - The birth of children
  - Major anniversaries
  - Accomplishment of lifelong goals

Review policies that impact balance.

- Allow "personal time" off, like options for unpaid leaves.
- Offer opportunities to earn time off during peak work periods to use during periods with a lower workload demand.
- Offer personal and family supports for both child and elder care, like:
  - Comprehensive benefits
  - Daycare
  - Fitness facility access
  - Health education
  - Family responsibility leaves
- See Work-life balance, from the Canadian Centre for Occupational Health and Safety, for initiative ideas to boost work-life balance and guides on how to implement these changes.
- Remind and demonstrate to your team regularly that your organization's committed to balance as an important part of being healthy and productive.

Provide flexible work arrangements when possible.

- Consider:
  - Compressed work schedules
  - Working from home
  - Virtual conferencing
  - Part-time work
  - Contract opportunities
  - Job sharing
  - Longer days with more days off for those who find more balance with this schedule instead of the traditional 5-day workweek

- Provide appropriate support for shift-based employees. For example:
  - Limit split and rotating shifts
  - Provide advance notice of shift change
  - Permit shift trading
- Offer supports for employees who work from home or off-site, such as appropriate technology and resources.
- Ask employees what solutions will work best for them. Refer to Accommodation strategies to help employees who have disabilities to remain productive.

Provide educational opportunities to support work and life balance.

- Make available information on creating and sustaining balanced work-life demands. These may include enhanced resiliency, coping and problem-solving skills.
- Offer a range of educational internal and external opportunities on non-job-related topics. Consider ideas like "lunch-and-learn" sessions on childcare or eldercare issues.
- Ensure your team's aware of existing company and community resources or programs that support work-life balance.

Support employees who are struggling with their mental health.

- There are many tools and resources available to help:
  - Referring employees to resources includes tactful wording you can modify to refer employees to resources like EAP, support groups or online resources.
  - A tool to support employee success is a free tool to support employers in helping an employee create and follow a workplace plan that addresses performance and workplace stressors.

Support employees who are caregivers.

- Offer Caregiver resources to employees struggling with balancing caregiving with work. Caring for a family member, partner or friend can be distressing. You may feel stressed when you can't personally provide all they need to be comfortable and when you aren't sure where to turn to for help.
- Use Leader support for employees who are caregivers for strategies to support employees who are caregivers for family members or loved ones with mental health or other health issues.

Take steps to prevent burnout.

- Review Burnout response for leaders to:
  - Help understand the issue
  - Recognize workplace factors
  - Be aware of signs and symptoms
  - Take pro-active steps to help reduce the impact of burnout on employees and workplaces
  - Consider facilitating an organization-wide workshop where each employee completes the Resilience. This self-reflection resource can help them identify effective strategies and resources to build resilience.
  - Consider sharing Burnout in the workplace: a focus on prevention. This free webinar explores workplace factors that cause the mental harm leading to burnout. It also discusses how to eliminate or control hazards that may lead to burnout.

Additional actions and resources

- Ask for employee input when making decisions about benefit programs. For example, provide flexible or “opt-out” options.
- Develop clear expectations around employee availability, communication and technology use during off-work periods.
- Review Psychological health and safety policy recommendations to see where you can improve psychological health and safety.

Adapted from Guarding Minds at Work





Creating change process

It can seem daunting to prioritize and choose those evidence-based actions most likely to improve psychological health and safety in the workplace. Use this Creating change process to help you think through the options and guide your decision making.

Psychological health and safety is a process of continual improvement. Trying to do too much all at once can create stress and put pressure on employees. Instead, consider implementing smaller changes over time. Focusing on one initiative at a time may be ideal. After you incorporate these initiatives, or when they're no longer necessary, you can add more.

Choose your evidence-based action. Then, use the Creating change worksheet to refine your plan.

Step 1: Assess potential actions

Weigh risks and benefits to help identify potential challenges and opportunities before you commit. Review each of the following points against your proposed action. Then write your response on the Creating change worksheet you've already started:

1. **Appropriateness** is the degree to which the action's relevant to our work situation and good for our organization.

   This would be an action compatible with our work demands and setting. Record on the Creating change worksheet why you feel the action's appropriate.

2. **Acceptability** is the degree to which the employer, union if applicable, and employees would agree to implement the action. Actions should be:

   - → Beneficial for all
   - → Easy to explain to decision makers
   - → Easy to communicate to employees
   - → Straightforward to implement

   Decision makers and employees may reject actions that are overly complicated or interfere with the ability to meet objectives. In unionized environments, the action should align with the collective agreement. Record on the Creating change worksheet why this action will be acceptable to all workplace stakeholders.

3. **Accessibility** is the degree to which everyone can participate regardless of ability or location.

   There are many considerations in terms of who can access the action. They include location, method of delivery and timing. Language, literacy level and format also can slow or hinder access.

   It's important to include and support employees with differing abilities. Record on the Creating change worksheet how this action will be accessible to everyone.

4. **Efficiency** is the degree to which we have the resources to implement and sustain the action.

   Do a cost-benefit analysis on the action. Estimate these costs:

   - → Material
   - → Delivery expenses such as transportation, venue or refreshments
   - → Time and expenses for developers, facilitators, participants and evaluators to participate

   Weigh the expenses against the value this action may achieve for each participant. Here's an example:

   - → The total cost is $5,000.
   - → 50 or more employees will become more aware of protecting their own mental health.
   - → The potential cost-benefit is decreased absenteeism and improved productivity for $100 per employee.

   Record on the Creating change worksheet why this is an efficient action.

5. **Effectiveness** is the degree to which the action will have a positive measurable impact and lead to the intended outcomes.

   Ensure anyone can see a link between the selected action and the intended outcomes. This is critical. This evidence can come from established workplace practices, evidence-based resources or academic literature. Record on the Creating change worksheet the evidence for why the action will be effective as well as how you'll measure success.

   Measurements of success could include the following approaches and metrics:

   - **Participation** – measure how many people take part in your action.
   - **Behaviour changes** – track the number of times participants do things differently. Give specific direction in advance. What behaviour change are you looking for? How do participants or their leaders report this action?
   - **Absenteeism** – track the number of days off in the months before and after implementing the action. Look for changes in trends. Look for ways to maintain confidentiality while tracking absence.
   - **Complaints, conflicts or grievances** – track the number reported in the months before and after the action.
   - **Awareness** – survey employees to determine the level of awareness about your action or the intended outcomes.
   - **Participant perception** – ask specific questions about the experience with the action.
   - **Supervisor perception** – survey supervisors about changes resulting from this action.
   - **Focus groups** – bring together participants to discuss how the action impacted them and suggestions for improvement.
   - **Stress satisfaction scan** – administer this 6-question survey before and after the action to measure changes in how employees feel about work.

6. **Safety** is the degree to which all potential risks to both physical and psychological safety are eliminated or managed.

   Unintended consequences can happen at an individual or organizational level. For example, we may trigger or stigmatize employees when we discuss mental illness. Come up with potential risks to physical and psychological safety. This will reduce the likelihood of them happening. In the Creating change worksheet, record the risks you identified and how to prevent or mitigate them.

   Once you've added your ideas to the Creating change worksheet, you may need to get approval.

Step 2: Choose actions that meet criteria

Prioritize the actions that meet your criteria, identifying what will be done first. This can include one or more actions.

Step 3: Choose the action planning team

Assign people to the various responsibilities found in the Committing to our success form.

Step 4: Implement the action(s)

Be sure to use the methods of measurement to assess the effectiveness of your action.

Step 5: Evaluate the outcomes

Analyze your measures of success to report on the extent to which the action(s) were able to reach the intended outcomes.

Step 6: Use a continual improvement approach

Your evaluation can support a process of continual improvement. Take what you learn from the action and consider how you can do it better or if the best course of action is to continue as is.



Creating change worksheet

Relevant psychosocial factor: balance

Group members: _____

Date: _____

Description of action proposed:

Appropriateness is the degree to which the action is relevant to our particular work situation and good for our organization.

Relevance to our organizational or team objectives:

Acceptability is the degree to which the employer, union if applicable, and employees would agree to implement the action.

The chosen action will be acceptable to our employees (and union if applicable) because:

The chosen action will be acceptable to our employer because:

Approval may be needed for:

Accessibility is the degree to which everyone can participate regardless of ability or location.
(Indicate how those with any of the disabilities below would be supported to participate.)

- Language
- Sight
- Mobility
- Hearing
- Mental illness

Description of method:	Location and timing of the action to allow everyone to participate:

Efficiency is the degree to which we have the resources to implement and sustain the action. Create a cost-benefit analysis – be as detailed as you can.

Estimate costs including any:

- Staff time for planning, development, delivery and participation
- Materials including copies
- Equipment or technology
- Refreshments or meals
- Venue
- Other

Describe resources available without cost, such as:

- Volunteers
- Repurposing or recycling existing materials

Describe potential benefits, such as:

- Reduced absenteeism
- Fewer grievances
- Less injury or illness
- Improved employee energy
- Improved well-being
- Increased engagement
- Boosted morale
- Increased productivity

Effectiveness is the degree to which the action will have a positive measurable impact and lead to the intended outcomes.

State your intended outcomes:	Evidence that this action will lead to each of the intended outcomes:

How we'll measure success: see the Creating change process for examples of ways to measure success. Choose one from there or describe your own.

Safety is the degree to which all potential risks to both physical and psychological safety are eliminated or managed.

Identify all potential risks and list strategies to address them:

Committing to our success

Improving balance in our workplace – potential implementation team

Recommend names and emails, including your own, of who should be involved in:

	Name	Email
Leading the project		
Finalizing the action plan		
Developing measurement tools like surveys or interviews		
Researching, securing or creating resources to use for the action		
Communicating about and promoting the action		
Managing registration if necessary		
Facilitation of the action		
Participation in the action		
Facilitating the completion or analysis of measurement tools		
Presenting on the outcomes of the action to senior leaders		
Evaluating the outcomes against the objectives		
Authorizing continual improvement		

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:

Discrimination prevention and inclusivity
Address discrimination and promote inclusivity through your policies and processes. This creates a positive environment and supports all employees to thrive and succeed.

Employees' role in psychological health and safety
Free online learning modules for employees to learn how to contribute to a mentally healthy workplace. This orientation to psychological health and safety in the workplace is for individuals.

Guarding Minds at Work
Provides a comprehensive set of free resources to help assess and address the psychological health and safety of workplaces. It was used as a reference for the National Standard of Canada on Psychological Health and Safety in the Workplace.

Mental health policies and programs
Helps inform policies and programs related to Accommodation, return to work, EAP, stigma, suicide prevention and peer support strategies for organizations.

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.

Strengthening leadership skills
This booklet of activities can help you build leadership skills, including emotional intelligence, resilience and communication strategies.

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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