Workplace Strategies for Mental Health

Compliments of Canada Life

Workshop series



Participant handout

Putting clear leadership and expectations on the agenda: **creating change**



The results from employee input during the Creating awareness workshop on this topic should accompany this handout. If this piece is missing, please notify the workshop facilitator.

If you haven't already done so, please read through this handout before starting the workshop.

This session aligns with the recommendations of the National Standard of Canada on Psychological Health and Safety in the Workplace (Canadian Standards Association CSA z1003).



Process

- **Review** psychologically safe discussions
- **Recap** definition and statements
- **Align** employee input with evidence-based actions
- **Define** criteria for choosing actions
- **Complete** Creating change worksheets
- **Share** ideas
- **Vote | Refine | Commit**



Psychologically safe discussions

- **Focus** on moving forward and not on the past
- **Offer** constructive suggestions for improvement
- **Discuss** ideas, not individuals
- **Allow** everyone the chance to contribute

Guarding Minds at Work description of positive clear leadership and expectations:

"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."

People in this type of work environment would be able to say:

- I know what I am expected to do in my job.
- Difficult situations at work are addressed effectively.
- I am informed of important changes that may impact how my work is done.
- My supervisor supports me to do my job successfully.
- The reasons behind organizational changes are explained.
- I am told about the impact of organizational change on my job.

Appendix

Evidence-based actions for creating change in clear leadership and expectations Adapted from Guarding Minds at Work

For an up-to-date list of actions, visit Evidence-based actions for clear leadership and expectations.

Clarify expectations for both processes and outcomes.

- Employees can be demoralized when they work hard on something that doesn't meet expectations. Developing employee plans for leaders helps you create a clear agreement about what's expected from individual employees.
- Break down job expectations and responsibilities into more manageable and clear components. Refer to the Task improvement process to help guide employee discussions about improving specific tasks.
- Improve clarity about the amount of work and the time that should be allocated to each task.
    - It's not unusual for supervisors to be unaware of exactly how employees complete tasks or the entire scope of work they're doing. Sometimes employees continue to do work that's no longer required because their supervisor hasn't asked them to stop.
    - One approach to address these issues is to have employees keep a log of their work every 15 minutes for 2 weeks. The employees aren't likely to appreciate the additional task, but it can help the supervisor clarify and reprioritize work. You can explain to employees that their expectations may have been unreasonable because their supervisor may not understand the extent of their work. This will help them to keep expectations reasonable.
- Help all employees to prioritize their tasks on a regular basis. This is especially important when there's always more work than can be completed in a day.

Take employee mental health into account.

- To ensure you're protecting employee mental health at different stages of their workplace plan, refer to Performance management.
- Ensure job descriptions are current, specific and agreed upon by relevant employees.
- Ensure your change management process considers the impact on psychological health and safety. This is important at the beginning of the decision-making process and throughout the change.
    - Change is often difficult, but even more so for employees who deal with mental health issues. Helping employees to manage change provides information that can help you support all employees through organizational or job changes in a psychologically safer way.

- Supervisors may feel they're creating a sense of equality when they join their employees in complaining about those who are responsible for decisions in their workplace. However, this behaviour can increase stress in the workplace because employees may feel more victimized or hopeless about their situation. Instead, leaders should talk to their employees about the best possible response to difficult situations. Bonding around solutions instead of problems creates a more resilient team.
- Sometimes a situation can be difficult because of the emotional or psychological state of one or more employee(s). Supervisors and leaders should be trained on when to effectively and respectfully intervene at these times. You can use A tool to support employee success to help guide that kind of conversation.
- Sometimes difficult situations related to personal, family or health issues are outside the scope of the workplace. In this case, it's important to know what resources are available and how to refer employees to them. This enables supervisors to focus on supporting employees with work-related issues. Referring employees to resources can help.

Discuss effective communication with your employees.

- Ask employees to share the type and format they prefer for various forms of communication such as:
  - → Critical feedback
  - → Organizational change
  - → Organizational events
  - → Performance review
  - → Recognition or reward
- This could include:
  - → Type of communication: email, text, conversation or other
  - → Format: interactive, requiring confirmation or training
  - → Setting: face-to-face, team meetings, town hall or other
- Even organizations that spend a lot of time and energy on communication may find their employees don't feel it's effective. We're living in a time of information overload, so we need to rethink traditional means of communication and implement a strategy that meets employee needs.
- Everyone in the workplace can benefit from being trained in respectful conflict resolution. Conflict response for leaders and Resolving personal conflict are both effective approaches.
- Difficult situations are addressed more effectively when employees have greater levels of emotional and social intelligence. Fortunately, they can learn these skills with Emotional intelligence in organizations.

Ensure approved leadership strategies are psychologically safe.

- Assess and improve leadership strategies using the Psychologically safe leader assessment.
- Being an effective leader is a process of continual improvement, especially in the area of self-awareness. Approaches for people leaders offers a variety of tools and resources to help.

Train all leaders in effective conflict resolution.

- Make sure all employees know who to turn to when they're dealing with a difficult situation, especially if the difficulty is with their supervisor.
- Encourage face-to-face communication, particularly for difficult issues.
- Hold all members of the organization accountable for their actions and ensure managers and leaders are held to the same or higher standard.
- Conflict response for leaders is an effective approach to resolving conflict in a psychologically safe way.

Additional actions and resources

Create explicit measurements of success for psychologically safe leadership from the supervisor level and up.

- The Psychologically safe leader assessment provides guidance on creating expectations for all managers and leaders.
- Accountability agreements that form part of the leader performance assessment should be reviewed every year.
- Recognition and reward for leaders should include their impact on the psychological health and safety of their employees.

Review Psychological health and safety policy recommendations to see where opportunities exist to improve how managers and leaders impact psychological health and safety.

Adapted from Guarding Minds at Work



Creating change criteria:

- Honours the input of our employees
- Improves clear leadership and expectations
- Is within our budget
- Is easy to implement now
- Minimizes risk to psychological safety

Up to 3 evidence-based actions chosen by our group

Why we feel this will create the change we want:

1

2

3



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: clear leadership and expectations

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:

Notes about potential actions

Use this space to record any questions or comments about the actions presented

Refining our top action(s)

This space is for notes about potential challenges, solutions to those challenges and ways to improve the effectiveness of the actions chosen.

Committing to our success

Improving clear leadership and expectations 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.

All Workplace Strategies resources are available to anyone at no cost, compliments of Canada Life. To learn more, visit clwsmh.com.

Canada Life and design are trademarks of The Canada Life Assurance Company. 79-00908 PH 11/22