Workplace Strategies for Mental Health

Compliments of Canada Life



Facilitator guide

Putting workload management 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, Alexander 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/resources/assessments-tools-and-workshops.

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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 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. 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/resources/assessments-tools-and-workshops. 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/resources/assessments-tools-and-workshops or can be used digitally.

Facilitating this topic

- For smaller businesses or independent teams, you can run the Creating awareness workshop and the Creating change workshop on the same topic on the same day. To do this, the leader participating in the workshop must be authorized to make decisions about budget, resources and policy.
- **In all other situations, we recommend presenting the compiled ideas and anonymous comments from the Creating awareness workshop to the decision makers before beginning the Creating change workshop.**
- **Before this workshop, ask the decision makers to point out any constraints related to budget, resources and policy for proposed plans or changes. Establishing these criteria 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:**
  - 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
- If you'd like some 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 employee time or organizational budget limitations and 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 can 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 workload management.

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. See the list of Evidence-based actions for creating change in workload management in the appendix of this guide. The list is also in the participant handout. 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 workload management on the agenda workshop: creating change



You're invited to contribute to the development of a plan for continual improvement of workload management 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**]. **Please get familiar with the evidence-based actions and the Creating change process, so we can be most efficient when we come 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 workload management 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 workload management 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.

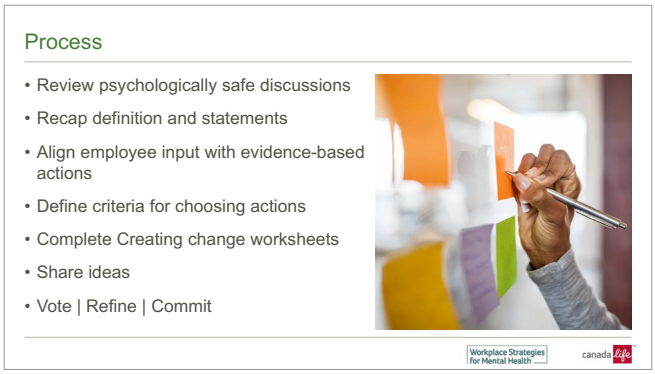
This session is intended to formalize an action plan for improving workload management that builds on the employee input. We'll align the evidence-based approaches with consideration for any policy or budget constraints.

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. Workload management has likely created stress in the past. There will no doubt be times of workload stress in the future. You may have unresolved or past issues related to workload management. Anyone who's dealing with this should speak to me privately so we can take steps to help you with that.

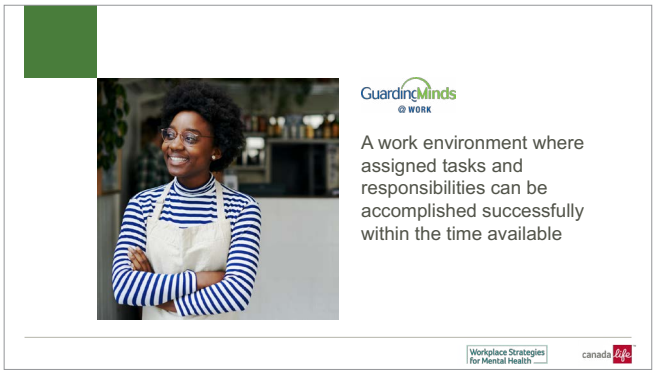
We'll always have room for improvement. Let's be both practical and creative and come up with suggestions to improve workload management for our whole team. Please don't single out any one person or group. Make sure everyone in your group has a chance to contribute to the discussion.

Transition

Let's now review what workload management means.

Notes

Slide 4 2 minutes



Describing workload management

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 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. Many factors will influence the level of stress 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 or
- Disinterested

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

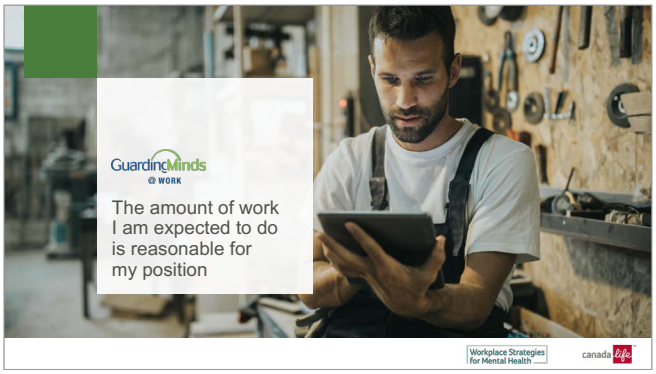
How we feel about our workload can and does change with our circumstances.

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

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

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

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 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

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 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

Facilitator notes

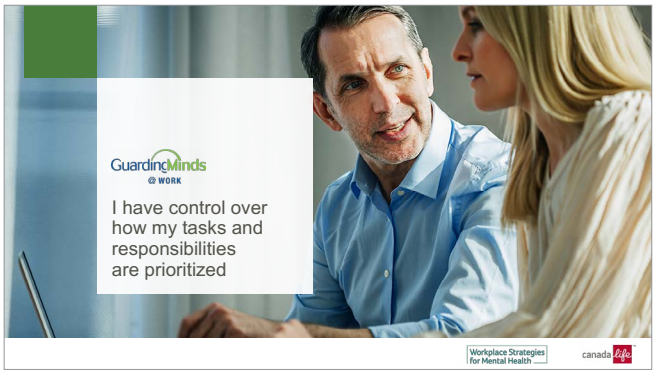
If you're running this workshop on the same day you ran Creating awareness, you can briefly recap the content on this slide.

Suggested wording

My work is free from unnecessary interruptions and disruptions.

Notes

Slide 9 15 seconds



I have control over how my tasks and responsibilities are prioritized

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 have control over how my tasks and responsibilities are prioritized.

Transition

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

Notes

Slide 10 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 workload management. 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.

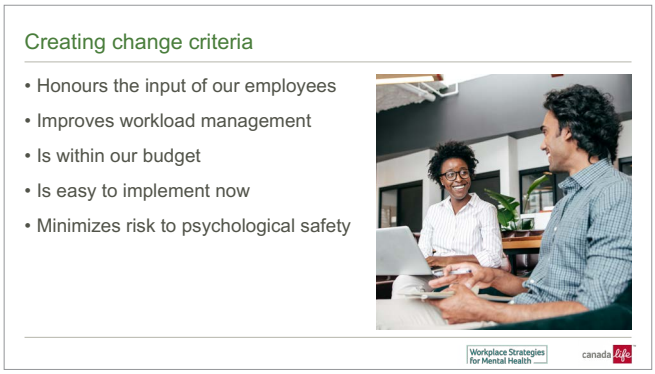
[**Once the time's up**]

Transition

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

Notes

Slide 11 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 workload management
- 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 workload management. 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 workload management – 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.

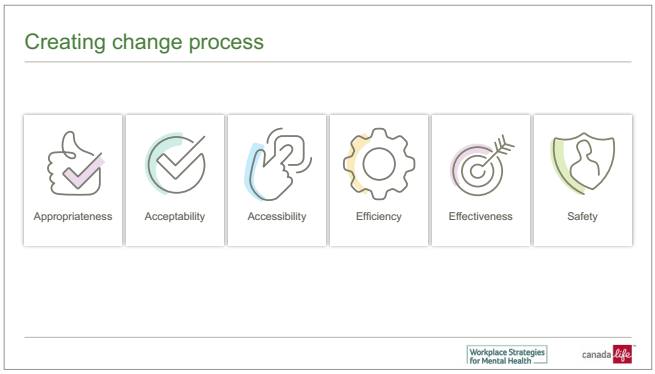
[**After 10 minutes**]

Transition

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

Notes

Slide 12 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.**]

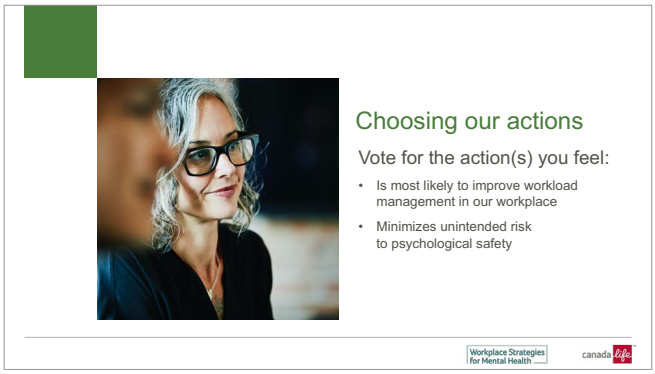
[**After each group has presented**]

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 13 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 workload management. Today, we want to prioritize a quick win by striving to take immediate action that will make a positive difference. Each of you'll vote on the action you feel will best improve workload management 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**]

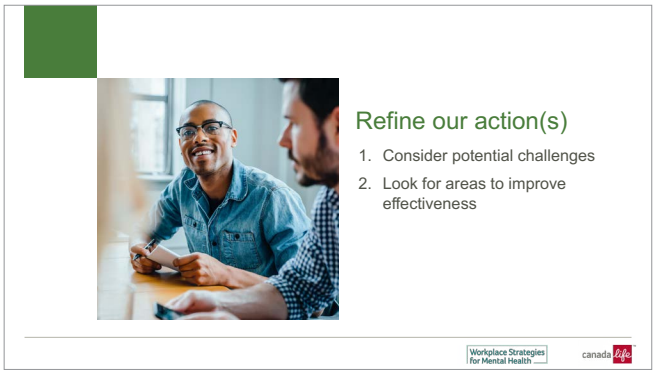
The idea we've chosen to implement first is [**state the idea that won**] and the others have been prioritized according to the number of votes they received.

Transition

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

Notes

Slide 14 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.

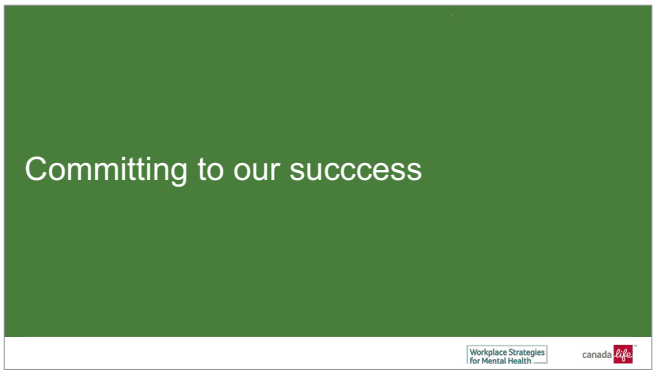
[**Let them know when 5 minutes is up and ensure you or someone else is ready to record the answers.**]

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 15 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 16 15 seconds



More resources

Facilitator notes

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

Suggested wording

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

Notes

Appendix

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

Consider whether your work culture increases or decreases workload stress.

- Cultivate a work culture that clearly values the quality and effort of work performed over output alone.

Ensure all supervisors and leaders set clear and reasonable expectations.

- Provide supervisors with the necessary time to meet with employees about workload challenges.
- Provide training so leaders have the skillset to support employees to meet their workload requirements.
  - A tool to support employee success can help.
- Have all leaders work with employees to:
  - → Create solutions
  - → Agree on reasonable expectations
  - → Identify any barriers to success
  - Task improvement process includes a fillable form to help employees focus on specific tasks that require attention.
  - The Getting employee commitment for leaders approach actively engages employees in developing a plan that meets the organization's needs and increases their willingness to commit over the long term.

Develop strategies for managing workloads with your employees.

- Review the results of the Putting workload management on the agenda: creating awareness workshop. This will provide input from employees about their workload stressors and proposed solutions.
- The higher the demands at work, the more important it can be for employees to have some level of control. However, it may not be possible to give employees control over how their work is prioritized due to regulations, safety concerns, customer or patient demands. Explore where employees can have some control over their assigned tasks to help them work more effectively.
- Inform new employees of accurate and realistic job demands and expectations.
- Include explicit and reasonable productivity expectations in job descriptions.
- Review productivity expectations on a regular basis.
- Provide pay or lieu time for approved overtime worked.
- Analyze and audit jobs to determine:
  - Workload demands
  - Equity in work distribution
  - Areas for improvement

- Help with prioritizing, eliminating redundant tasks and managing deadlines.
  - Developing employee plans for leaders can help you create a workplace plan that considers both what and how work gets completed.
  - Performance management focuses on developing solutions.
- Provide education on topics related to workload management, such as time management and the use of technology.
- Ensure employees have the necessary equipment and supports to complete their work competently and efficiently. These may include adequate time, tools, technology and clear instructions.
- Create and implement strategies for dealing with peak periods of demand, sick leave or unfilled positions. For example, temporary employees, job pools or job-sharing could cover staffing shortages.
- Prepare employees for anticipated periods of increased work, such as seasonal demands and peak shift hours.
- Consider providing non-remunerative perks during times of excessive work demands. These could include:
  - Meals
  - Covering transportation costs
  - Help running personal errands
- Discuss workplace interruptions and disruptions with employees. Brainstorm potential solutions, including:
  - Changing the use of technology
  - Limiting meeting times
  - Revising communication strategies
  - Scheduling quiet time
  - Managing lights, noise or foot traffic
  - Although you may not be able to eliminate all interruptions, providing protected time during the day may help.
- Include best practices for protecting employee psychological safety in your policies and procedures.

Additional actions and resources

- Review Psychological health and safety policy recommendations to see where you can improve psychological health and safety. Include best practices for protecting employee psychological safety in your policies and procedures.

  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: workload management

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 workload management 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		


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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:

Identifying employee issues for leaders

Learn the questions to ask yourself and the employee before a potentially sensitive discussion. Topics include:

- Considering your own needs
- How to focus on solutions
- Your own management style
- Addressing workplace and mental health stressors
- Creating a list of resources for these issues

Developing employee plans for leaders

The employee and employer develop a plan to create solutions to work-related issues. Use this plan to help in areas of performance, accommodation or return to work.

Psychologically safe leader assessment

Improve the comfort and effectiveness in resolving workplace issues to enhance psychological health and safety for all. These resources can help.

Team building activities

Teams can face many challenges in the workplace, including conflict, bullying, low control, and high demands. Discover team building activities, facilitation strategies for discussions, the importance of resilience and more. The resources are both practical and easy to use in a variety of workplaces their own conflicts at work.

Approaches for people leaders

Use these practical and action-oriented guidelines to address work issues, including:

- Conflict
- Performance
- Accommodation
- Dementia
- Impairment
- Return to work
- Violence

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

Contact us through social media or at clwsmh.com

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