Workplace Strategies for Mental Health

Compliments of Canada Life



Participant handout

Motivating the powers that be

Embedding psychological health and safety in organizational strategy

About Workplace Strategies for Mental Health

Why is this training and 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 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-informed and user-friendly. These resources are free to help make sure they're accessible to everyone.

Over the years, many people have contributed generously to the quality and usefulness of our resources, including:

- Subject matter experts
- Researchers
- Academics
- Workplace stakeholders
- People with lived experience from across Canada and beyond

Workplace Strategies has developed high-quality resources like Guarding Minds at Work, Psychologically Safe Leader Assessment, Supporting employee success, Psychologically safe interactions, Plan for resilience, Mental health awareness videos and much more.

Canada Life has long recognized that psychological health and safety impacts overall employee well-being and performance. They support many initiatives aligning with their core values to benefit all Canadians, not just clients, from coast to coast to coast. These include initiatives focused on education, health and wellness, community development and social services.

All resources are available to anyone at **clwsmh.com** compliments of Canada Life.

Special thanks to those who helped to develop and refine this session: David MacDonald, Sarah Jenner, Laura Pratt, Jill Magis, Susan Jakobson, Jan Belanger, Scott Mitchell, Laurel Mansfield, Carolyn Chapman, Ilana Korble, Ida Brass, Kimberly Ferris, Caroline Workman, Audrey Morneau-Beaulieu, Michelle Belfry, Courtney Polos, Christine Hildebrand, Krista Mikkelsen, Jacqueline Bailey, Danielle Duchesne, Margret Vivian, Ginette Drisdelle, Elaine Ward, Leanne Shelley, Marly Score, Kim Ferreira, Jesse Hogan, Jason Kryschuk, Julie Maltby and Lise D'Andrea.

Table of contents

Welcome 7

Introductions 8

Understanding the employer's perspective 9

Fact-finding interview guide 12

Fact-finding interview example 19

Link psychological health and safety strategies to business goals 20

Your turn - Link desired outcomes to solutions 22

Sample solution 24

Appendix 27

- Case studies 28
- Asking for the interview 32
- Formal proposal considerations 33
- Proposal template 34


Future
Forward
Products
Strategy

Welcome

Dear participants,

Welcome to **Motivating the powers that be**. We hope this training provides you with a great networking experience and valuable tools and resources.

Our focus is on helping to embed psychological health and safety into the organizational strategies, goals, policies and processes in a way that's helpful for leaders and employees alike.

The practical tools and knowledge you gain today will have a direct impact on your ability to motivate employers to protect and promote psychological health and safety in their workplaces.

Enjoy the day!

Diane



Diane Bezdikian
Executive Director
Workplace Strategies for Mental Health

Introductions

Share your name and title or role and what you'd like to get out of today.

Use this space to record other participants' names and what those in your group would like to get out of today.

Understanding the employer's perspective

Seek first to understand, then to be understood.

— Stephen R. Covey

It is wise to persuade people to do things and make them think it was their own idea.

— Nelson Mandela

Business goals and objectives

These can change yearly for some organizations, so a broad understanding of potential goals is helpful to note. These goals are related to whatever's important to the organization right now.

What reasons do employers give for NOT acting on employee wellness or psychological health and safety?

Assign someone to record the answers from your small group and use this space to record the answers from the larger group when they're shared. Your volunteer will be asked to give 2 reasons not already shared and, at the end, will be asked if there's any we haven't already heard.

How else can you increase resistance?

- Make leaders feel bad or incompetent
- Rush to survey
- Use jargon they don't understand
- Don't respond to their desired outcome
- Get stuck on data collection or return on investment (ROI)
- Go over budget in terms of:
  - → Time
  - → Money
  - → Resources

The approach

- Start where the employer is at – have a fact-finding interview
- Match your proposed solution to their perceived issue or in support of their goals
- Make it practical – embed it in business as usual
- Make it affordable – leverage free resources
- Make it easy to say **yes** – keep it concise and relevant

Fact-finding interview guide

This guide provides suggested questions to ask the decision-makers before you propose a solution.

Instructions

- The **interviewer** will ask the questions. Everyone can ask follow-up questions.
- The **employer** (one person) answers as the employer using the case study or their own organization.
- If using a case study, be sure to share ALL the information given and make up any additional information if necessary.
- The **recorder** (one person) will record the answers and share with the group.
- You have 45 minutes.
- Case studies begin on page 28.
- A Fact-finding interview example is on page 19.
- The Fact-finding interview template begins below. Record your answers there.



Sample introduction

Today I want to explore the current state of your organization. I'll ask about your goals and objectives as well as anything that might help you to reach them. My role is to listen carefully and then think up potential solutions or ideas that could help support your goals while also improving performance and organizational excellence (or whatever they know your role to be such as improving wellness, occupational health and safety, human resources, etc.).

Interview questions

Feel free to ask follow-up questions as appropriate.

What's the purpose of your organization?

This reveals what they feel is important to their identity and value as an organization. You want to continue to reinforce this with whatever solutions you provide in your proposal. Avoid implying their purpose isn't enough.

How do you ensure your organization is sustainable and successful?

This speaks to any fears or concerns they may have about your solution creating a drain on resources or making it difficult to meet their goals. In your proposal you'll show how your solutions support sustainability and success of the overall organization.

What are this year's overall organizational goals and objectives?

This could be the goals stated in the annual strategy or more current goals. The response from the decision-makers is more important and relevant than what's stated in an annual strategy. You want to know what matters most to the decision-makers. Make sure your proposal describes how what you're doing can support these goals.

What can be changed or improved to support your goals and objectives?

Listen carefully and repeat it back for clarification. It's more helpful to understand the desired outcomes than to simply understand the perceived problem. You'll want your proposal to specify how you'll achieve some or all of these outcomes.

How would you measure the success of (whatever they want to be changed or improved)?

This may or may not be different than desired outcomes. Be prepared with relevant measures of success in case they don't have any. (See **Evaluation planning for psychological health and safety**)

What work-related challenges might keep your employees up at night?

Examples of this could be conflict, workload issues, working conditions, organizational change and other stressors that employees may be experiencing.

When do your employees come together for training or meetings?

This can help you look for how to embed the solutions in their "business as usual" practices like team huddles or meetings. You can also identify opportunities for intervention.

What work-related challenges might keep your leaders up at night?

Examples of this could be employee issues, workload issues, working conditions, new projects or technology, organizational change and other stressors that leaders may be experiencing.

When do your leaders come together for training or meetings?

This can help you look for how to embed the solutions in their "business as usual" team huddles or meetings. You can also identify opportunities for intervention.

What would you like your employees or leaders to do better or differently?

This is another point for measurement of success. Have your proposal include a way to support this if you're given any time with the employees or leaders.

What resources (time, money, capacity, etc.) do you have to devote to an initiative to address your challenges and support organizational success?

Time should include the start and end date of your work. Money should be budgeted outside of staff engagement. Capacity should be defined by role – frontline employees, frontline managers, department heads, senior leaders – as described by the organization. This is the amount of time each can engage in whatever you propose.

What else do you think I need to know to propose a solution that will really work for you?

Carefully listen to any fears, concerns or demands included in this response. If appropriate, you may want to ask about critical incidents like a labour dispute, suicide, merger or injury. You may want to ask about assumptions: who will administer assessments, data collection, need for translation, virtual or in-person training, etc. Indicate that senior leadership requested the proposal and asked you to share it with them. If appropriate ask if they have any advice for you to make the proposal most helpful.

Fact-finding interview example

What's the purpose of your organization?

We are a non-profit focused on workplace mental health and our main contribution is helping employers and leaders better address workplace issues in a way that does no harm, especially to those who have mental health issues.

How do you ensure your organization is sustainable and successful?

We ensure our organization is sustainable by creating diverse and relevant courses to support leader and employer success when addressing current workplace issues.

What are this year's overall organizational goals and objectives?

To develop an on-demand virtual library of courses to increase our reach and diversity of offerings. This means all hands on deck to reach tight deadlines.

What can be changed or improved to support your goals and objectives?

Our employees are passionate about the subject of workplace mental health and as a result don't always have good work boundaries. We also attract employees who have experienced mental health issues. We recently were accused of violating the human rights of one employee who was refused their request to take over the executive director's office space. They said it was necessary to accommodate their Seasonal Affective Disorder. We felt there were other options. The Human Rights Tribunal agreed with our decision but said our process was not respectful and asked that we retrain our leaders to do this better.

How would you measure the success of (whatever they want to be different or improved)?

Leaders will be able to support all employees to complete our new courses by the deadlines we have. Leaders will also help employees work hard, but with healthy work boundaries and within the human rights guidelines.

What work related challenges might keep your employees up at night?

Not meeting the goals and objectives set out for them by their leader and knowing that if we're not sustainable that their jobs are at risk.

When do your employees come together for training or meetings?

Every Monday morning for a meeting to gauge where each team member is at in their tasks. Goals are set for the week. Employees are given the autonomy to complete tasks in whichever way they choose.

What work related challenges might keep your leaders up at night?

Another human rights violation or not meeting deadlines or sales quotas necessary to maintain the sustainability of the organization.

When do your leaders come together for training or meetings?

Leaders have 4-hours of training a month, one hour per week and half of that is required for mandatory training.

What would you like your employees or leaders to do better or differently?

Not violate human rights and support employees to meet deadlines.

What resources (time, money, capacity) do you have to devote to an initiative to address your challenges and support organizational success?

Budget of $2,500. Leaders can spend up to 2 hours over the next 30 days - can be broken up into 2 1-hour sessions.

What else do you think I need to know to propose a solution that will really work for you?

Leaders are overwhelmed. Make the sessions lighthearted so they can enjoy them.

Link psychological health and safety strategies to business goals

Specific issue	Employer's desired outcome	Psychological health and safety strategies	Free resources from WSMH resource catalogue
Merger	• Team cohesion • New policies and processes	• Team building • Conflict resolution • Policy review	• Team activities • Resolving conflict workshop • Emotional intelligence workshop • Building trust for leaders • Leveraging team wisdom
Turnover	• Employee loyalty	• Leadership • Employee resilience • Workload stress	• Psychologically Safe Leader Assessment • Building resilience workshop • Implicit bias workshop • Workload management workshop
Employee safety	• Better focus on the job • Better supervision	• Supervision • Mental health awareness	• Emotional intelligence for leaders • Strengthening leader skills • Protection of physical safety • Healthy break activities
Patient safety	• Decreased absenteeism • Improved patient care	• Team building • Supervision • Mental health awareness	• Team activities • Prevent burnout • Implicit bias
Sales	• Improved salesmanship	• Emotional intelligence • Motivation to sell • Performance management	• Emotional intelligence skills assessment • Supporting task improvement • Growth and development • Recognition strategies

Some other examples of linking business goals to psychological health and safety initiatives are:

- **Expansion of locations** – improve hiring and onboarding, develop new teams, review existing policies and processes
- **Diversification of products or services** – increase innovation and creativity – resilience, growth and development, emotional intelligence
- **Diversity in hiring practices to ensure representation of the population** – implicit bias, discrimination and inclusion, team building
- **Reversing bad public relations** – positive branding – choosing your words, emotional intelligence, resilience, psychologically safe leadership, employee responsibility/mindfulness
- **Reduce turnover** – psychologically safe leadership, team building

Leverage free resources

There are many resources that may be available through your organization, your community or online. Your solution should include whatever best serves the needs of the organization.

For this exercise we'll use the Resource catalogue provided. These free tools and materials are known to improve psychological health and safety and can expand the scope and value of your proposal without adding cost.

Your task is to consider which of these resources could help you meet the needs of the employer in your case study.

You don't necessarily have to mention the resource by name but mention the approach and the outcome that it can help you to facilitate.

For example, if the employer's goal was to do a better job of accommodating employees with mental illness, instead of saying that you'll use the Supporting employee success tool to create a plan for each employee, specify that you'd take 2 to 3 hours per employee to collaborate on a plan that meets the leader's need for performance while supporting the employee's need for wellbeing at work.

You could go on to say that this plan will be very specific in addressing workplace issues such as attention to detail, working relationships and exposure to stressful work environments.

Each resource has a legend beside it that helps you understand the way this resource relates to psychological health and safety strategies. These strategies include:

- Conflict resolution
- Emotional intelligence
- Mental health awareness
- Policies and programs
- Resilience
- Supportive leadership or supervision
- Team building

Tips for describing your solution

Speak their language

- Mimic the language that decision-makers used in your fact-finding interview
- Avoid overwhelming with too many details
- Avoid jargon
- Focus on what matters to them, rather than what matters to you

Embed solutions in their "business as usual"

When writing your proposal, incorporate the solutions as part of their "business as usual", rather than adding more time or processes. Embed solutions in day-to-day routines, such as:

- Leadership training
- Team meetings
- Virtual meetings
- Mandatory training
- On-boarding or orientation
- Lunch 'n learn
- Wellness or health and safety committee meetings
- Policies or programs

Your turn - link desired outcomes to solutions

- You have 60 minutes
- Assign someone to record the group's answers to the following questions:
  - → How would you describe the employer's situation and desired outcome?
  - → What psychological health and safety strategy would you propose?
- Be sure to write this as if you were making a pitch to the employer that you interviewed earlier.
- Assign a volunteer to share your answers.

How would you describe the employer's situation and desired outcome?

Summarize what is important for the other participants to understand the organization's challenges and desired outcomes. This information will be helpful background information for the larger group to understand your approach. Consider key information that supports your decision to use a specific strategy or resource.

What psychological health and safety strategy would you propose?

Using the Resource catalogue, choose one or more strategies you believe will help meet the desired outcome. Describe in detail how you'd implemment your plan and how it would benefit the employer. Remember to stay focused on what the employer wanted and said they'd support in the fact-finding interview.

Sample solution

This is an example of taking the information from the fact-finding interview example and answering the two questions. At the end you'll see the shortened version of what would be reported back to the larger group.

How would you describe the employer's situation and desired outcome?

We're pleased to present this proposal in response to our discussion with the CEO, John Smith. As a national non-profit whose focus is to create positive change in workplaces through diverse and relevant course offerings, we see an opportunity for your organization. We will help your leaders learn a process that respects human rights, while supporting your employees to remain productive. These strategies can then be leveraged as an additional course offering for your current and potential clients.

We propose teaching your leaders how to comply with the request from the Human Rights Tribunal. Our focus will be showing leaders how to respectfully respond to requests for accommodation even when the specific approach the employee asked for may not be approved. This process is something many organizations could use, and therefore it can be leveraged as one of your future course offerings.

What psychological health and safety strategy would you propose?

Our organization will facilitate a session where we teach your leaders the Supporting employee success process. This process will help leaders to address all workplace issues and provide the employee with an opportunity to develop solutions that support their success at work. This tool has been reviewed by human rights lawyers and is in alignment with the duty to accommodate.

The tool will be shared with the participants in advance, so they have an opportunity to review it prior to the live session.

Hour one: Review process and the tool
Hour two: Work through a case study and address any questions

The tool will be left with the participants in order for the relevant leaders to create the course.

If the organization would like a follow-up session to review the application of the process, this can be arranged for an additional fee. If this is not chosen, the recommendation is that the leaders facilitate their own follow-up session.

Depending on the demands of the leaders, the sessions could be split up between two weeks, or the two hours could be done in one day.

Your organization's work to create the new course material can begin immediately afterward.

The session itself will be a total of two hours as approved by the CEO. Leaders who wish to spend time reviewing the tool prior to the sessions can do so. The organization can also assign a team to develop the content into course material.

Leaders will have an effective process to address employee work issues in a way that supports ongoing success. An added value is that this process can become a new course offering developed by your organization.

The initial investment is $2,500.00 for the two-hour session. A one- hour follow-up session would be an additional $1,500.00.

The tools will be provided in digital format only.

The cost to develop new course material will be the responsibility of the organization.

Assign the person responsible for coordinating dates and location of training.

What need did your proposal meet for the employer? And what was your recommendation?

The need was to ensure compliance with the Human Rights Tribunal request to improve leader response to employee accommodation needs. We also responded to the need to create more course content in order to support the sustainability of the non-profit.

The recommendation was to provide training on the Supporting employee success tool and that it be turned into course content.

Yeah but…

Discuss any issues or challenges that you anticipate in terms of motivating the powers that be to address psychological health and safety. Choose one or two to bring forward to the larger group discussion.

Notes



Appendix

Case studies

Case study #1 – Retail

We are a large national department store that prides itself on low prices and one-stop shopping. We keep prices and expenses down by managing hourly rates of pay, buying in bulk and selling most products on consignment. As a result of the pandemic, our sales figures have plummeted and our main goal for this year is a 50% increase in sales.

We would like all staff to do a better job of upselling and cross-selling our products and services. This can be measured by our gross sales figures.

A typical day for employees would include: stocking shelves, answering customer questions or working the cash registers. Yearly there is mandatory online training modules which employees much finish on their shift. Each module is approximately 45 minutes.

Each store manager has up to 10 assistant store managers as direct reports. Most store managers meet with their assistants daily for up to 20 minutes. They also deal with suppliers and focus on profitability.

Each assistant store manager receives direction from corporate head office and passes that on to the relevant department managers. This usually has to do with displays, and moving sections of stock to align with corporate direction. They also run employee team meetings, which are 10-minute team huddles at the beginning of each shift where all employees discuss life events (birthdays, return to work, etc.), corporate updates, sales updates, and events. They also discuss daily and yearly goals. Most store managers work an average of 50+ hours a week, with no overtime, while managing minimum wage employees who are sometimes not motivated to up-sell or cross-sell.

Department managers do the same work as other employees, but are responsible for inventories, displays and scheduling.

We would love it if leaders were better able to motivate employees to upsell or cross sell.
We would be willing to put the following resources into the right solutions:

- 1% of the increase in sales that are achieved.
- Employees can spend up to 30 minutes a month for online learning that can be done in their store.
- Assistant store managers can spend up to one hour a month for training that can happen in their store.
- Store managers will devote one half-day twice a year at our store manager conference.

Any solution should be a maximum of four pages but you can add links to other materials if you want us to consider them.

Case study #2 – Construction

We build affordable and secure housing. We keep costs down through efficiencies in terms of time and resources.

This year our goal is to reduce on-the-job injuries. We think this can be accomplished if employees learn strategies that help them work safely and efficiently. We would measure success by keeping track of on-the-job injuries.

A typical day for an employee would be working from dawn until dusk, in all types of weather and wearing PPE. Employees do tasks as assigned that can range from lifting heavy objects, being in confined spaces, working from heights or working with other contractors.

A typical day for leaders would have on-site supervisors responsible for the work and safety of employees. They answer to the company's leaders who work in our head office. Company leaders work with clients, architects, vendors and contractors to set up agreements and give direction to the on-site supervisors.

Work delays, employee injuries, going over budget and faulty construction keep leaders up at night.

For a solution, we'd be able to allocate 15 minutes per week at the on-site safety meeting. This can be one hour per quarter for on-site supervisors and two hours total with company leaders.

You should note that most of our employees don't have access to computers or smartphones.

On some sites there is no electricity, so this can't be a slide presentation.

We do all the mandatory safety training now and don't want to repeat it.

Case study #3 – Corporate office

We're an international accounting firm that manages the finances for various organizations and helps them operate effectively. We remain successful through constant vigilance and commitment to integrity and responsible business practices.

Our goal this year is to help ensure employees support the planned merger with our biggest competitor and are themselves supported during the transition to the combined entity. We would measure this with an employee engagement survey at the end of the year. We want to see employees from both organizations become committed to and engaged in supporting the merged organization.

This will require employees to learn new processes, unlearn existing processes and work with people that were previously competitors. In many cases, employees have been, or will be required to change jobs and site locations. Up to 25% of our employees will be required to work from home indefinitely.

As for leaders, in addition to their regular duties they're dealing with new branding, new team members, new policies and new clients. They worry about not being able to keep up with the current rate of change, losing their position due to the merger, and effectively dealing with management and employees from the other organization. Our desired outcome is to outfit our leaders with the resources and skills they need for their new team to be effective and cohesive.

For the solution, we're able to allocate 30 minutes at regularly scheduled team meetings which can happen anywhere from weekly to quarterly depending on the leader. The total budget is $1 per employee. The total number of employees is 8,000. Please keep it brief.

Something to note is that there is some animosity between the employees from each organization. Many employers were completely blindsided when the merger was announced. Many employees are fearful of losing their jobs, and some of them will.

Case study #4 – Healthcare

We're a hospital that provides world-class patient care in a safe and caring environment. We remain successful by working within the annual budget that is given to us and ensuring patient safety.

Our goal this year is to improve patient safety and staff retention. We also want less cross-contamination and days with staff shortages. We will measure this by tracking patient safety complaints and staff sick days, as well as turnover rates.

A typical day or week of an employee may often include having to cover for staff who have left or called in sick. Often staff are working with shortages and dealing with up to twice as many patients than usual. Due to staff shortages, patients and their families are more likely to be angry, which can result in some patients throwing feces, spitting or yelling at staff.

Leaders will deal with complaints from staff, patients and pressure from senior management and reduce risk and improve outcomes. They worry about lawsuits that could put the viability of the hospital at risk. We'd like to see improved employee engagement and greater support for patient safety.

For your solution, the joint health and safety committee can devote 30 minutes at each monthly meeting. Leaders can devote one hour per quarter. Frontline staff can do a 30-minute online training course once per quarter. The solution must be evidence-based and be as brief as possible.

You should note that often frontline staff have to skip their quarterly training to respond to patient needs.

Case study #5 – Restaurant

We're a national chain of restaurants and all of our restaurants are corporately owned. We pride ourselves on being a fun place to enjoy sporting events and get togethers with friends for affordable and delicious meals.

This year our goal is to improve recruiting and reduce turnover. To do this we'd like to see staff in key positions (managers, chefs, bartenders, etc.), as well as permanent wait staff, choose to stay with our restaurants long term. We expect to see the turnover rate reduced by 50% in these positions. The expectation is that students and casual staff will continue to have high turnover rates.

The typical day for an employee will often include high pressure and high demand to achieve customer service standards. Our employees come into the restaurant and hit the ground running from open to close.

Our leaders are in the corporate head office with little exposure to the day-to-day experience in the restaurants. Their days are spent largely on the phone, putting out fires such as short staffing, employee complaints and manager challenges. They worry about their inability to recruit and retain sufficient staff to meet the needs of the restaurants that are their responsibility. We'd like to see them improve their ability to respond in a way that is not just supportive in the moment but includes long term solutions to recurring problems.

For the solution we can allocate no more than $2,000 plus employee time. Front line employees could devote 30 minutes at their quarterly meetings. On-site key positions (managers, chefs, bartenders, etc.) could devote one hour per month. Corporate leaders could devote one hour per week if worthwhile. The proposal should consist of a maximum of four pages, but you can add links to other materials if you want us to consider it.

You should note that turnover is common in the restaurant industry because the work is hard, pay is low and competition is high. We are not able to raise hourly rates at this time. We have some locations that have significantly lower turnover rates. Wait staff and kitchen staff don't get along well in most locations.

Asking for the interview

Consider choosing or modifying one of the following to help you request time for the fact-finding interview. Find the one best suited to your role and relationship to the decision-makers.

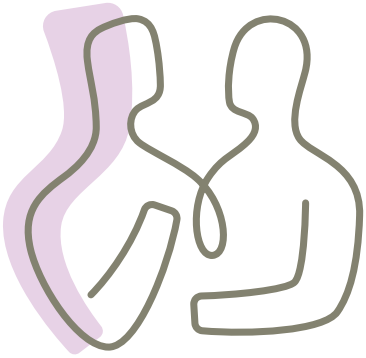
I'd like to learn more about your organization so I can consider how I might be helpful.

I'd like to explore where your team is headed with this organization so I can align my efforts with yours.

I'd like to understand your perspective of the organization so I can align my leadership strategy with yours.

Thank you for inviting me to quote on this work. I'd like to understand more about your organization so my work better serves your needs.

I'd like to speak with the senior leaders who make decisions about organizational initiatives.



Formal proposal considerations

In this session we won't be creating formal proposals, but we've included some things to consider if this next step is necessary.

Organizational goals and objectives

Include the goals and objectives you heard in your fact-finding interview that are directly relevant to what you'll propose. This can become background or overview. The point is to make the case for what the employer has told you they want.

The desired outcome

State the desired outcome in a positive way – what the employer hopes to make better or different rather than what is wrong. The more closely your language mirrors theirs the more your proposal will resonate with them.

Your proposed plan to support success

Be specific about what you're doing, what evidence supports your choice and how that will lead to the desired outcome.

Timeline

Make this timeline flexible by using terms like step, stage or phase 1 rather than a specific date. Also build in contingencies. For example:

"The time to complete stage 1 is four weeks from the date we receive the policies for review or schedule the leader training. This is necessary before going on to stage 2 or this can be run simultaneously with stage 3."

The point is to make sure that you don't disappoint if the project takes longer due to organizational delays. Managing these expectations upfront helps everyone to understand what's required.

People involved

Specify who among the staff will participate and the amount of time you'll need from each of them. If you don't know the people by name, consider adding their roles. For example, if you want to involve a wellness committee or health and safety committee, you can just state that. If you want all HR professionals or all front-line leaders, make sure you're specific.

Measurements of success

Explain in detail how and when you'll measure success and how the data will be assessed.

Make sure the employer values the chosen measurements. You'll have gathered this information in your fact-finding interview. For other ideas about how to measure success, see Evaluation planning for psychological health and safety.

Investment

Your minimum recommendation for a potential solution must result in a measurable outcome that proves the value of what you're proposing. In other words, even the first phase of any larger plan must bring measurable value. The investment for this should be within the budget that you've been given by the employer, even if that budget contains only employee time.

If relevant, create a list of additional options with a price for each. This allows the employer to add on whatever else is valuable to them.

Next steps

Determine what's required to get this started – signatures, authorization, setting dates, etc.

Sample formal proposal template

Organizational goals and objectives:

The desired outcome:

The proposed plan to support success:

Timeline:

People involved:

Measurements of success:

Investment:

Next steps:

Notes

Workplace Strategies for Mental Health

Workplace Strategies for Mental Health resources are:

- For all employers, people leaders, employees and facilitators of workplace psychological health and safety
- Available in English and French
- Evidence- or practice-based
- Available to anyone at no cost



Examples of the resources available at **clwsmh.com/materials** include:

Where do we start with psychological health and safety?

Not sure where to begin in addressing psychological health and safety in your workplace? At the link, you'll find the steps on how to get buy-in, communicate the plan and support continual improvement.

Psychological health and safety policy recommendations

This framework provides policy recommendations for potential impacts on psychological health and safety. It covers policy, planning, implementation, evaluation and review.

Psychological health and safety cost benefits

Support psychological health and safety at work by establishing costs and learning about legal trends. Also consider the cost of doing nothing.

20 Questions for leaders about psychological health and safety

How to identify workplace hazards and manage the potential for risk. Consider issues related to labour law, employment standards, human rights and more.

Evidence-based actions for psychological health and safety

Suggested actions are based on research or practice that can improve each psychosocial factor shown. In most cases, free resources are provided to help you move forward with or without additional funding.

On the agenda workshop series

On the agenda is a series of free workshop materials and facilitator tools to address psychosocial factors. Create an action plan with your team to improve psychological health and safety.

Guarding Minds at Work

Tools to help you assess the psychological health and safety of your workplace. This guide includes an organizational review process, action planning tools and worksheets.

Implementing the standard

Learn how to implement the National Standard of Canada on Psychological Health and Safety in the Workplace. These guidelines include many free resources to support your success.

Send us your feedback!

Contact us through social media or at **clwsmh.com**

Twitter LinkedIn YouTube

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. 70-0753-11/21