

On the **Agenda**



Facilitator's Guide

Balance

Balance



Slide # 1

For this slide, you want to ensure that you have already introduced:

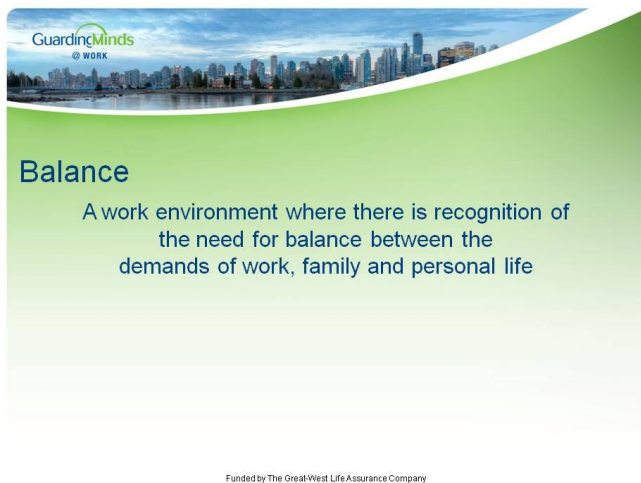
- yourself
- your role within the organization, if unknown to the group
- why you are engaging the group in this discussion
- the importance of addressing psychological health and safety in your organization

The importance of addressing psychological health and safety in your organization can be highlighted by stating the following:

1. Depression will rank second only to heart disease as the leading cause of disability worldwide by the year 2020, which can impact the workplace in areas such as bottom-line production and team work.
2. There are current and emerging legal requirements in Canada for the protection of employee psychological health and safety and the promotion of civility and respect at work.
3. Organizations that value and improve the health of the workplace can improve their organization profile. An improved profile can result in better recruitment and retention rates, enhancing the potential for growth. We want you and potential employees to know that we value your contribution to the organization, that you do good work and that we want to help you to continue to be successful at work.

After these statements, you might say: “The focus of this session is to discuss the promotion of balance in the workplace”.

On the Agenda



Slide # 2

This slide provides a definition of promoting balance in the workplace. We recommend starting with the proposed definition provided by *Guarding Minds @ Work*TM: “Work-life balance is recognition of the need for balance between the demands of work, family and personal life.” Then open the floor for questions about the definition. An idea to get employees to start participating in your presentation is to ask a volunteer in the audience to read the slide. You may wish to share additional information such as:

1. What does balance in the workplace mean?

Possible Answer: Showing respect for the fact that everyone has multiple roles in life: as employees, parents, partners, colleagues.

2. Why is balance in the workplace important?

Possible Answer: This recognition and balancing of roles allows for fulfillment of individual strengths and responsibilities, while also having success at work. This success allows employees to feel valued and that they are contributing at both work and home.

About PF11: Balance

What are Psychosocial Factors?

Psychosocial factors are elements that impact employees' psychological responses to work and work conditions, potentially causing psychological health problems. Psychosocial factors include the way work is carried out (deadlines, workload, work methods) and the context in which work occurs (including relationships and interactions with managers and supervisors, colleagues and coworkers, and clients or customers).

What is PF11: Balance?

GM@W defines PF11: Balance as present in a work environment where there is recognition of the need for balance between the demands of work, family and personal life. This psychosocial factor reflects the reality that everyone has multiple roles: as professors, parents, partners, etc. This complexity is enriching and allows fulfillment of individual strengths and responsibilities, but conflicting responsibilities can lead to role conflict or overload.

Why is Balance important?

A work environment where employers recognize the need for work-life balance makes employees feel valued and happier both at work and at home. When employers recognize that work-life balance is important, they realize the need for greater workplace flexibility. This flexibility helps minimize conflict by allowing employees to accomplish the tasks necessary in their daily lives. Balance reduces stress and the possibility that home issues will spill over into work, or vice versa. Balance allows staff to maintain their concentration, confidence, responsibility, and sense of control at work. Organizationally, this translates into enhanced employee commitment, job satisfaction, organizational citizenship behaviours (discretionary behaviours that are beneficial to the organization and are a matter of personal choice) and job performance. In turn, balance is associated with enhanced well-being and reduced stress. These effects have been demonstrated over time, showing a direct causal relationship to physical and psychological health.

What happens when balance is compromised?

Job stress is on the rise, surging from 20 percent in 1990 to 33 percent in 2000. Employees with higher job stress are more likely to be dissatisfied with work and be absent either physically or mentally. One source of stress is conflict between work and family roles. When work-family conflict occurs, health and well-being are undermined. This imbalance can lead to constant tiredness, bad temper, and inability to progress. These can, in turn, lead to additional stress-related illness, as well as higher cholesterol, depressive symptoms, and overall decreased health. The impact on the organization is increased costs due to benefit payouts, absenteeism, disability, and turnover.

How can Balance be improved?

Start by conducting the GM@W Organizational Review and/or the GM@W Survey and reviewing the results. If **Balance** is identified as an area of concern or relative strength, refer to the GM@W Action Resources for a practical strategy and evidence-based and effective suggested actions that can improve **Balance**. It is also important to discuss the findings with employees to gain a further understanding of the results and to obtain input into possible interventions. Furthermore, it is important to evaluate the undertaken interventions over time to ensure they are effective and to take corrective action where needed. Consider reviewing the resources below. Finally, refer back to the GM@W website on occasion for new ideas about how **Balance** can be enhanced.

Further information about Balance:

- Byrne, U. (2005). Work-life balance: Why are we talking about it at all? *Business Information Review*, 22(1), 53-59. doi: [10.1177/0266382105052268](https://doi.org/10.1177/0266382105052268)
- Casey, P., & Grzywacz, J. (2008). Employee health and well-being: The role of flexibility and work-family balance. *Psychologist-Manager Journal*, 11(10), 31-47. doi: [10.1080/10887150801963885](https://doi.org/10.1080/10887150801963885)
- Gallup Management Journal. (2006). Unhappy workers are unhealthy too. Retrieved from <http://gmj.gallup.com/content/14545/gallup-study-unhappy-workers-unhealthy-too.aspx>
- Gilbert, M. & Bilsker, D. (2012). *Psychological Health and Safety: An Action Guide for Employers*. Retrieved from http://www.mentalhealthcommission.ca/SiteCollectionDocuments/Workforce/Workforce_Employers_Guide_ENG.pdf
- Grzywacz, J., & Carlson, D. (2007). Conceptualizing work-family balance: Implications for practice and research. *Advances in Developing Human Resources*, 9(4), 455-471. doi: [10.1177/1523422307305487](https://doi.org/10.1177/1523422307305487)
- Harter, J. K., Schmidt, F., & Keyes, C. L. M. (2003). Well-being in the workplace and its relationship to business outcomes: A review of the Gallup studies. Retrieved from <http://media.gallup.com/documents/whitePaper--Well-BeingInTheWorkplace.pdf>
- Health and Safety Executive. (2012). Work related stress – together we can tackle it. In *Guidance*. Retrieved from <http://www.hse.gov.uk/stress/index.htm>
- Higgins, C., & Duxbury, L. (2005). Saying “no” in a culture of hours, money and non-support. *Ivey Business Journal*, 69(6), 1-5. Retrieved from <http://www.ivey.com.hk/executive/Saying%20No%20in%20a%20Culture%20of%20Hours,%20Money%20and%20Non-support.pdf>
- Kahn, W. A. (1990). Psychological conditions of personal engagement and disengagement at work. *Academy of Management Journal*, 33, 692-724. Retrieved from <http://www.jstor.org/stable/256287>
- The Great-West Life Assurance Company. (2012). PF11: Balance. In *Centre Resources by GM@W Factor and On the Agenda*. Retrieved from <http://www.workplacestrategiesformentalhealth.com>

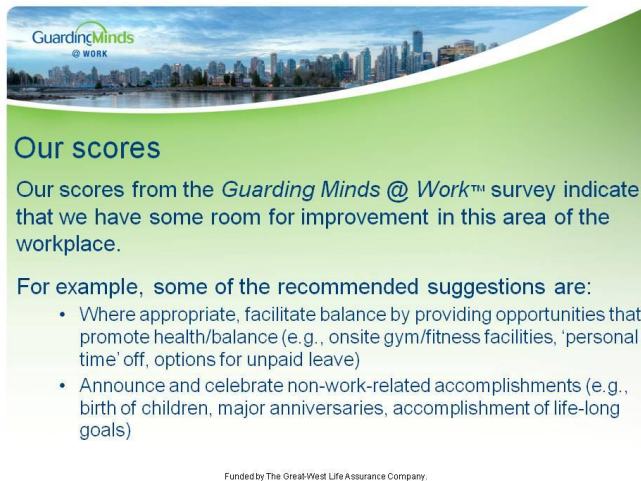
www.guardingmindsatwork.ca



Slide # 3

This slide details what balance in the workplace looks like. Simply read the points on the slide. If you would like to expand on the information, we suggest elaborating on what non-balance may look like. You can suggest the following and why you don't want this for your group:

- Employees with low balance are more likely to be absent from work either physically or mentally
- Employees begin to feel increased conflict at home and at work, and between their work-home roles
- Employees may complain of feeling persistent fatigue



Our scores

Our scores from the *Guarding Minds @ Work™* survey indicate that we have some room for improvement in this area of the workplace.

For example, some of the recommended suggestions are:

- Where appropriate, facilitate balance by providing opportunities that promote health/balance (e.g., onsite gym/fitness facilities, 'personal time' off, options for unpaid leave)
- Announce and celebrate non-work-related accomplishments (e.g., birth of children, major anniversaries, accomplishment of life-long goals)

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Slide # 4

If your workplace or a sector in the workplace completed the *Guarding Minds @ Work* (GM@W) Survey, you may wish to review the scores now. Let your employees know that there is always room for improvement, and it is also important to recognize and retain what is already working.

- Review the suggestions on the slide and let them know that putting psychological health and safety on the agenda is an active step to increase promotion of balance in the workplace.
- If your workplace has not undertaken the GM@W Review or Survey, ask the employees if they feel the suggestions on the slide would be helpful, and why or why not.

GM@W Suggested Responses

Please consult the *Selection of GM@W Suggested Actions* and *Selection of Effective Actions: Applying a Quality Framework* documents to help you select GM@W suggested actions to undertake for Balance.

PF11: BALANCE

OBJECTIVE: A work environment where there is recognition of the need for balance between the demands of work, family and personal life.

PF11: GM@W Survey Results (check rating, if applicable)	<input type="checkbox"/> SERIOUS CONCERNS	<input type="checkbox"/> SIGNIFICANT CONCERNS	<input type="checkbox"/> MINIMAL CONCERNS	<input type="checkbox"/> RELATIVE STRENGTHS
PF11: GM@W Organizational Review Results (check rating, if applicable)	<input type="checkbox"/> SERIOUS CONCERNS	<input type="checkbox"/> SIGNIFICANT CONCERNS	<input type="checkbox"/> MINIMAL CONCERNS	<input type="checkbox"/> RELATIVE STRENGTHS

Serious Concerns = 5 to 9 **Significant Concerns = 10 to 13** **Minimal Concerns* = 14 to 16** **Relative Strengths** = 17 to 20**

* Although this is a Minimal Concern, it is important to attend to it and review the GM@W Organizational Review Results and the GM@W Survey Results for any additional or individual-identified areas of concern.

** Although this is a Relative Strength, it is important to review the GM@W Organizational Review Results and the GM@W Survey Results for any additional or individual-identified areas of concern.

The list below contains actions that you can take to respond to actual or potential concerns related to **Balance**. Many of these actions have been found to be effective in research studies, have been recommended as best practices, or have been found valuable in applied settings. Some have been informed by emerging case law and regulatory requirements. The actions are drawn from diverse industries and sectors, and not all may be applicable or feasible in your particular workplace. This list is not exhaustive, nor is it intended to be prescriptive. Rather, these are suggestions for possible courses of action.

If **Balance** has been flagged as a **Relative Strength** in your workplace, it is important not to overlook this finding. You can do this by developing policies that protect this relative strength and engaging staff in discussions of how this strength can be enhanced by implementing the suggested actions below.

If **Balance** has been flagged as an area of concern in your workplace, consider which of these actions might be appropriate. In making your decision, it can be helpful to keep the following six key quality dimensions in mind: Appropriateness, Acceptability, Accessibility, Effectiveness, Efficiency and Safety (see *Selection of Effective Actions: Applying a Quality Framework* for more information).

The actions below fall into four main categories: (1) norms, values and practices of the work environment; (2) training and development initiatives; (3) communication strategies and approaches; and (4) formal policies and programs. You may have already initiated some of the actions – but consider the others. You may also have other ideas for actions you could implement – there is a space for writing these down at the end of this document. **Remember, not every action that might enhance Balance in your workplace is listed here. Implementing the following actions, however, will provide a strong foundation for building a psychologically healthy and safe workplace.**

Work Environment (Norms, Values & Practices)

- Have management support and model positive work/life balance behaviour (i.e., ensure that messaging is consistent with demonstrated behaviour/expectations)
- Facilitate balance by providing opportunities that promote health and balance (e.g., on-site gym/fitness facilities, provision of “personal time” off, options for unpaid leaves)
- Offer supports (e.g., appropriate technology and resources) for staff who work from home/off-site

Training & Development

- Provide information on creating and sustaining a balanced approach to the demands of work and personal life (e.g., enhanced resiliency, coping and problem-solving skills)
- Provide training opportunities for managers/supervisors to support both themselves and their employees in the management of work/life demands
- Provide a range of educational opportunities (internal and external) on non-job-related topics (e.g., attending “lunch-and-learn” sessions on childcare or eldercare issues)

Communication

- Communicate organizational commitment to balance as integral to overall health and productivity
- Increase awareness of existing company and community resources/programs that support work/life balance
- Support staff who wish to share non-work-related accomplishments (e.g., birth of children, major anniversaries, accomplishment of lifelong goals)

Formal Policies & Programs

- Provide flexible work arrangements, where possible (e.g., compressed work schedules, work from home, virtual conferencing, part-time work, contract opportunities, job sharing)
- Provide appropriate support for shift workers (e.g., limit split shifts, provide advance notice of shift changes, permit trading of shifts)
- Offer personal and family supports for both child and elder care (e.g., comprehensive benefits, daycare, fitness facility access, health education, family responsibility leave)
- Assess employees' perceptions of the value of benefits when making decisions concerning these programs (e.g., provide flexible/"opt-out" options)
- Offer opportunities to earn time off during peak work periods (e.g., to use during lower workload demand periods)
- Encourage use of allocated time off
- Develop parameters around communication, availability and technology use (e.g., email, phone) during off-work periods and have leaders model this approach

Additional resources have been created to help you take action, including: presentation slides and supporting materials (freely available at www.workplacestrategiesformentalhealth.com/ota) and a new resource - *Psychological Health and Safety: An Action Guide for Employers*, developed on behalf of the Mental Health Commission of Canada Workforce Advisory Committee, that is a practical tool designed to help employers develop implementation plans on the basis of GM@W findings (freely available at www.mentalhealthcommission.ca/SiteCollectionDocuments/Workforce/Workforce_Employers_Guide_ENG.pdf).

We encourage you to review these resources for additional suggested actions.

Other Actions:

- _____

- _____

- _____

There won't be a perfect set of actions – often it's a matter of choosing the actions most likely to accomplish positive outcomes while generating the fewest potential problems.

Once you have selected one or more actions to undertake, enter them into the corresponding *GM@W Action Planning Worksheet*, pick your start date, identify who will be involved – your Action Team, and get started!



Activity

Review actions recommended by research or best practices

Choose the recommended actions that:

- a) Are most likely to be effective in promoting balance
- b) Are low cost or no cost in terms of both time and expense
- c) Will have a measurable benefit to the workplace as a whole

Slide # 5

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- Review the recommended actions in GM@W Suggested Responses document or choose those that you wish to share with the group as possibilities.
- Ask the employees to work in groups of three or more to review the suggested responses and discuss what each of these may mean for your workplace in regards to practicality, profit, cost and challenges.
- Ask that someone keep notes, and let them know that their group is to report back to the larger group in 15 minutes.
- Ask for a group to volunteer to start the report back and begin the discussion to choose which initiative(s) to begin with.
- Check out the Centre website at www.workplacestrategiesformentalhealth.com for free resources related to balance.



Slide # 6

- Ask the employees to vote on the most important recommendation that they heard from the previous exercise. Ballots, Post-it Notes, stickers or raised hands are all ideas that could be used for voting.
- If there is a discrepancy, see if you can narrow the options down to two and discuss the potential pros and cons of each option and then re-vote, or consider implementing more than one option at once if this would be practical.
- Develop a statement with the group about why the chosen recommendation is important.

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Activity

Create a plan to implement

Use the handout provided to:

- Describe the action
- Assign tasks to individuals on the team
- Create a start date
- Develop an indicator to determine if the action had the desired effect
- Create a date to evaluate

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Slide # 7

- Hand out the Action Planning Worksheet to each employee so he or she can follow along.
- Identify each step required to implement the chosen action(s).
- Review the steps and ask for volunteers to take on different actions. If individuals feel uncomfortable taking on an action by themselves, suggest working in pairs or groups.
- Set a follow-up date to review progress on the action items together, as well as an expected completion date.

GM@W Action Planning Worksheet

Name: _____

Position: _____ Date: ____/____/____

PF11: BALANCE

OBJECTIVE: A work environment where there is recognition of the need for balance between the demands of work, family and personal life.

PF11 GM@W Survey Results

PF11 GM@W Survey Score: _____ (5 to 20)

Date administered: ____/____/____



PF11 GM@W Organizational Review Results

PF11 GM@W Organizational Review Score: _____ (5 to 20)

Date administered: ____/____/____



Serious Concerns = 5 to 9 Significant Concerns = 10 to 13 Minimal Concerns* = 14 to 16 Relative Strengths = 17 to 20**

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** Although this is a Relative Strength, it is important to review the GM@W Organizational Review Results and the GM@W Survey Results for any additional or individual-identified areas of concern.

	Selected Action(s) (What exactly are you planning to do?)	Starting Date (What is a realistic date to begin?)	End Date (Is the action ongoing or will it end? If so, when?)	Action Team (Who is involved? Be specific.)	Indicator(s) (What changes do you expect to result from this Action?)	Evaluation Date (When will you determine if the Action was successful?)
Action Priority 1:						
Action Priority 2: <i>(if applicable)</i>						
Action Priority 3: <i>(if applicable)</i>						

**Slide # 8**

For this slide, we suggest encouraging your employees to check out the *Workplace Strategies for Mental Health* website at www.workplacestrategiesformentalhealth.com. The website features a number of employee-specific resources they can access for free:

- Self-assessment tools to check their current state of mental health
- Information about mental health, addiction and mental illness
- Approaches to mental wellness and coping with workplace stressors
- *Working Through*, It which is a video-based series of video clips by, and for, those struggling while at work, off work or returning to work