



MANAGING MENTAL HEALTH MATTERS

Facilitator's Guide for
MANAGING MENTAL HEALTH MATTERS

TABLE OF CONTENTS

Episode 1:

Facilitator's Guide.....	1
Pre-work Email.....	14
Participant's Workbook.....	15

Episode 2:

Facilitator's Guide.....	21
Pre-work Email.....	33
Participant's Workbook.....	34

Episode 3:

Facilitator's Guide.....	41
Pre-work Email.....	50
Participant's Workbook.....	51

Episode 4:

Facilitator's Guide.....	55
Pre-work Email.....	63
Participant's Workbook.....	64

Episode 5:

Facilitator's Guide.....	68
Pre-work Email.....	76
Participant's Workbook.....	77

FACILITATOR'S GUIDE – EPISODE 1

MANAGING EMOTIONS

This workshop has been designed for experienced facilitators with management experience. However, you do not need to be a mental health expert to conduct these workshops. The program is designed for a group of approximately eight to 20 participants. If your group is larger or smaller than this, you may need to make some minor changes to the exercises and adjust the timing accordingly.

When conducting the exercises, if any questions or situations arise that cannot be dealt with immediately, or is beyond your level of expertise, put them in a “parking lot”, an area designated for questions or comments not directly related to the current discussion. You can then address them at the end of the workshop. If there is insufficient time to deal with these during the workshop, let the participants know you will follow up with them after the session is over.

The episode quiz at the end of the workshop is optional. Complete it if time permits.

In order to prepare for this workshop, set aside approximately 60 to 75 minutes.

Advance Preparation Checklist

To prepare to facilitate this workshop, please complete the following:

- Review the Leader's Guide and Participant's Workbook, and add relevant examples and additional insights based on your management experience.
- Review all video clips associated with *Managing Emotions*.
- Review the pre-work email and prepare to customize it in advance of the workshop, prior to distribution. Book the meeting space.
- Send invitations to attendees.

One to two weeks in advance of the workshop:

- Distribute the customized pre-work assignment and the PDF of the Participant's Workbook to participants.
- Ask participants to bring their workbooks with them to the workshop.
- Two to three days prior to the workshop, remind participants to complete the pre-work assignment.

Consider which organizational policies, procedures or resources are relevant to the session you will be holding and have copies on hand.

- Prior to the workshop, you may choose to distribute the resource material through the pre-work email.
- Bring a few extra copies of the Participant's Workbook with you to the session.

Supplies Needed

- One flipchart, paper, markers
- Timer or watch to track time
- Name tags or tent cards and markers

Detailed Workshop Agenda

Task	Exercise	Approximate Timing
Introduction	Welcome Participants Share Learning Objectives and Agenda	5 minutes
Pre-work Assignment	Dos and Traps to Avoid	15 minutes
Active Listening	Think. Pair. Share.	10 minutes
Dealing with Challenging Workplace Situations	Scenarios	25 minutes
Quiz (time permitting)	Episode Quiz	5 minutes
Wrap-up		5 minutes

Facilitation Tips

As you are an experienced facilitator, we have only highlighted suggestions below on how to deal with possible disruptive behaviours. Ideally, during your introduction, you may want to set some courtesy rules. State your expectations for involvement, such as respecting other people's opinions, and only one person talking at a time. Acknowledge that participants may have different levels of experience in managing emotions in the workplace. Don't take disruptive behaviour personally. Intervene only if necessary.

A participant that strongly or often disagrees

- Refer to the courtesy rules.
- Don't get involved in a power struggle – agree to disagree and move on.
- Speak and act confidently.
- Use direct eye contact.
- Manage your own emotions.
- Be succinct.
- Empathize but don't agree.
- Ask for more information, if necessary.

A participant that becomes angry or verbally aggressive

- Refer to the courtesy rules.
- Adopt a respectful, relaxed posture and use a firm but calm tone.
- Try to uncover the participant's concern.
- Focus on a solution.
- Establish boundaries – if participants are verbally abusive, state that verbal abuse will NOT be tolerated.

A participant that remains very quiet and does not participate

- Have participants work in pairs or small groups (think. pair. share.).
- Encourage responses by using open-ended questions and direct eye contact.
- Pause, and give participants time to think.
- Smile, and be encouraging and approachable.
- Provide positive reinforcement when participation occurs.
- Understand that not everyone needs to interact to learn.

A participant that rambles

- Ask closed questions to prevent long, drawn out responses.
- Listen carefully and bridge back to the topic by gently interrupting.
- Decrease eye contact with this participant.
- Consider assigning the person the role of time keeper.

Participants who engage in side conversations that disrupt you and others

- Stand near a disruptive participant.
- Ask questions to colleagues close to disruptive participants.
- Stop talking; the silence will speak louder than their words.
- Ask the group if they can hear you.
- Refrain from asking disruptive participants to share their conversation.

Preparation Checklist for Day of the Workshop

- Distribute name tags or tent cards.
- Have extra copies of the Participant's Workbook available.
- Prepare Agenda flipchart
 - Introduction
 - Pre-work Exercise – Dos and Traps to Avoid
 - Active Listening
 - Dealing with Challenging Workplace Situations
 - Quiz
 - Wrap-up
- Prepare General Strategies flipchart
 - Give time to calm down
 - Give positive reinforcement and point out strengths
 - State that there is no one person to blame
 - Ask for their feedback
 - Empathize with what they are going through

Introduction – Five minutes

Engage your audience with a relevant story or anecdote. Welcome everyone, introduce yourself, state your credentials and put the following in your own words...

- Dealing with distressed employees can be one of the greatest challenges any manager faces.
- Your role as a manager can feel particularly demanding when, in addition to the full range of regular tasks you do daily, you have to deal with workers who may exhibit intense, counterproductive, emotional states or mental health issues.
- Remind participants that they are at the workshop to learn how to implement strategies to deal more effectively with employees who display anger, crying, defensiveness, sad or withdrawn behaviour.

Show agenda on pre-prepared flipchart.

Transition to the pre-work exercise.

Pre-work Exercise: Dos and Traps to Avoid – 15 minutes

The goal of this exercise is to raise awareness of the skills managers need to effectively handle emotional situations in the workplace.

Instructions for Dos and Traps to Avoid Exercise:

- Refer participants to page 1 of the Participant's Workbook.
- Put participants in approximately equal sized groups.
- Give them five minutes to share their responses to both sides of the chart that they completed as a pre-work exercise. If some participants did not complete the exercise, they can still participate by drawing on their own experience.
- Take a maximum of 10 minutes to debrief, using the chart below.
- Supplement the chart with examples and additional ideas based on your experience.

Based on your experience and from what you observed in the videos, what skills do managers need to do well when dealing with emotionally charged situations at work?	What traps should managers AVOID falling into when trying to manage emotions in the workplace?
<p>Manage what you say and do when you are having an emotional reaction to the situation. Understand the impact that your emotional reactions may have on others.</p> <p>Use active and effective listening skills.</p> <p>Recognize and validate emotional reactions in others.</p> <p>Remain calm.</p> <p>Seek alternative perspectives in difficult situations.</p> <p>Energize a team to develop a solution.</p> <p>Apologize sincerely when wrong and articulate how you will change things.</p> <p>Respect emotional reactions while having clear expectations on acceptable behavior (acceptable to be angry but not to lash out).</p> <p>Learn effective ways to defuse situations and manage behaviors when someone is emotionally distressed.</p>	<p>Ignoring or avoiding a problem.</p> <p>Passing the buck or blaming someone else for team problems (common enemy).</p> <p>Trying to get one or more team members to align against another to deflect blame from you.</p> <p>Trying to resolve a complex issue when you are feeling defensive or emotionally distraught.</p> <p>Failing to engage the employees in developing solutions.</p>

Summarize and transition to Active Listening.

Active Listening – 15 minutes

It is important that all participants are aligned on what is meant by “empathizing”, “paraphrasing and clarifying” and “pausing”. To cover this content, you have the choice of either:

- Asking for volunteers to state their understanding of the terms then clarifying if necessary.
- Alternatively, just explain or read aloud the definitions below.

The first technique may take a bit longer but is the preferred method as it is more engaging for the audience. Note that these definitions are in the Participant’s Workbook on page 16.

Empathizing

Empathizing involves putting yourself in the other person's shoes. It requires you to be sensitive to the feelings expressed, or implied, by that person. It helps the person get in touch with his or her feelings or attitudes. Empathizing creates rapport, opens the lines of communication and encourages discussion and further sharing. For example, "it must be very frustrating for you when..."

Paraphrasing and Clarifying

Unlike parroting, which repeats back what the person said exactly as he or she said it, paraphrasing involves rewording what the person said into your own words. The paraphrased statement is usually followed by a short question to clarify or check for understanding. By paraphrasing and clarifying, you are giving the person the opportunity to correct you if you have misunderstood him or her. It is also an effective means of communicating that you are listening and interested in what the person is saying. A paraphrasing or clarifying statement often starts like this... "If I understand you correctly, you think..." and ends with a clarifying question like, "Did I get that right?"

Pausing

Pausing is easy to define and difficult to do. It requires you to stop talking and not fill the void of silence. For example, in the video, Rebecca does this very well with the sad or withdrawn employee. A few tips to help you purposefully pause:

- Bite the inside of your cheek!
- Count to 10 in your head.
- Let the silence get to them before you let it get to you.
- Take a sip of water.
- Take a deep breath.

State: It is human nature for us to make judgments and assumptions about people especially in emotionally charged situations. We need to take the time to listen actively so we understand the employee's perspective before we share our views.

Instructions for Think. Pair. Share. Exercise

- Ask: "How might using these active listening skills help you diffuse emotion and handle emotionally charged situations better?"
- Tell participants to take one to two minutes to individually reflect and record their ideas on page 16 of the Participant's Workbook.
- After one to two minutes, or when participants stop writing, ask them to pair with another participant to compare their answers.
- If you are behind schedule, assign just one skill to each team of two.
- Ask for a few volunteers to share their ideas with the group.
- Supplement their answers, if necessary, using the chart below.

Active Listening Skill	How this skill could help diffuse emotion
Empathizing	<ul style="list-style-type: none"> • By empathizing, you acknowledge the employee has an issue or point of view • Lets employees know you are listening and that they were heard • Helps employees realize you understand their situation and it encourages employees to share how they're feeling
Paraphrasing and Clarifying	<ul style="list-style-type: none"> • Lets employees know you were listening and interested • Gives you and the employee the chance to make sure you both share the same understanding of the situation
Pausing	<ul style="list-style-type: none"> • Gives you and the employee time to think • May give you and the employee time to calm down, if necessary • Encourages you to wait for his or her input and not fill the void by reverting to telling them what to do

Summarize by reinforcing the importance of using active listening skills when managing emotionally charged situations.

Transition to dealing with challenging workplace situations.

Dealing with Challenging Workplace Situations – 25 minutes

State: This next exercise is designed to provide a forum for us to discuss some “real life” scenarios you could face on the job. We will take some time now to review these scenarios in small groups and come up with suggestions on dealing with these situations more effectively.

State: You should always maintain realistic expectations for interactions with distressed employees; you may not be able to fix their problems, but you can certainly offer them your support and help to diffuse the situation.

Refer to the pre-recorded flipchart and share general strategies to follow for all emotionally charged situations. Encourage participants to record these in their workbook on page 17:

Strategies could include:

- Give the emotionally distressed employee time to calm down.
- Give positive reinforcement that highlights strengths.
- State that there is no one person to blame.
- Ask for feedback.
- Empathize with what is being experienced.

Instructions for Scenarios Exercise

- Refer participants to page 17 of their workbook.
- Divide participants into four groups; have the groups identify a group leader.
- Give the groups five to 10 minutes to discuss and record their ideas.
- Debrief by giving each team one to two minutes to report their ideas.
- Encourage participants to take notes in their workbook starting on page 17.
- Use the notes below to supplement the groups' ideas.

Sad or Withdrawn Employee

An average employee suddenly appears to be avoiding contact with peers and looks visibly upset. This employee is not crying and has not said anything about his or her situation.

- Recognize and respect the preference to talk or not.
- Provide a safe environment for the sharing of thoughts while respecting personal boundaries.
- Listen actively, pause, don't rush.

Emotionally Charged (Angry) Employee

An employee who was passed over for a promotion has been slamming drawers, giving one word answers and is often sarcastic.

When dealing with an aggressive employee, it's best to communicate in an assertive, non-defensive way.

Strategies for interacting with aggressive employees:

- Separate them from other employees.
- Adopt a respectful but relaxed posture and firm but calm tone.
- Express intent to help.
- Focus the conversation on solutions.
- Establish boundaries – make it clear that aggressive behaviour, especially if it becomes verbally abusive or violent, will NOT be tolerated.

Fearful or Panicky Employee (when presented with negative feedback)

When asking for a change on a report, this employee begins to turn red in the face, clenches his or her jaw, looks away and says very little.

There are a number of personal triggers that shape responses to negative feedback; some of these include:

- Childhood experiences.
- Relationship to parents.
- Depression and anxiety.
- Traumatic experiences.
- Phobias.
- Misperceptions about the person doing the criticizing.

Negative feedback can often be perceived as a personal attack, so it's important to make sure the other party knows this is not the case. Here are some tips for providing constructive, specific feedback geared towards behavioural change:

- Begin with clear articulation of the preferred outcome rather than what went wrong.
- Acknowledge the worker's efforts.
- Acknowledge individual strengths.
- Make feedback specific to behaviours rather than personality traits.
- Provide clear, concrete examples of behaviours.
- Give the worker a chance to respond.
- Frame feedback as an opportunity for professional growth.
- Don't take employees emotional reactions personally.

Emotionally Upset (Crying)

A co-worker tells you that an employee is softly crying at his or her desk.

Sometimes dealing with an emotionally distressed employee can be difficult because of your own personal barriers; you may feel upset by the emotional state, or even blame yourself for it. These types of reactions are natural, and it's important to remember that others' emotions are more a reflection of their own thoughts than they are about you.

When dealing with an emotionally distressed employee, you can signal support through empathy, a soft tone of voice, and non-verbal gestures like nodding and leaning in slightly. Here are a few other methods you can use to avoid escalating an employee's emotional state:

- Slow down your rate of speech.
- Give them space.
- Don't try to fix things.
- Don't try to make the crying stop.
- Avoid making intense eye contact.
- Focus on taking a supportive approach.

Summarize

There are a variety of strategies to deal with differing situations and there are many more scenarios that there wasn't time to cover in this workshop. For more information, visit *Managing Emotions* at www.workplacestrategiesformentalhealth.com/mmhm.

Transition to the Episode Quiz.

Episode Quiz

Quiz Instructions

- Direct participants to the quiz in their workbook on page 18.
- If time permits, ask participants to review and individually respond to each question.
- Ask questions and seek participants to volunteer their response.
- If time is short, conduct the exercise as a large group by reading the question and asking for a show of hands as to which answer they prefer.
- Provide feedback as necessary using the “rationale” information below. When Rebecca met with Allan and received news about her team's latest numbers:

1. When Rebecca met with Allan and received news about her team's latest numbers:

Answer	Rationale
a) She should have asked Allan to communicate the message to her team.	As the team leader, it is Rebecca's responsibility to communicate bad news about the project. To avoid this difficult task would be seen by her team as “passing the buck” and not fulfilling her leadership role. They might even perceive it as disrespectful for her to not communicate problems directly.
b) She should have asked Allan to reconsider his position, given that she had communicated to her team how well they had been doing.	Although tempting, avoiding a difficult situation usually just leads to an even more difficult situation in the future. Especially in a serious situation like the one facing her team, honest and open communication, no matter how uncomfortable, is almost always best. It would have been unrealistic for Rebecca to try to convince Allan to change his mind, and he may have been shocked at her attempt to strategize herself out of a tricky situation.
c) She should have told Allan how upset she was by the news.	Although she is the manager and team leader, it is understandable for Rebecca to have an emotional reaction to the bad news about the project. As long as she communicates her negative emotions respectfully, it is definitely appropriate for her to share her thoughts with Allan. In fact, it will be helpful for him to know exactly how Rebecca feels about the situation.

2. Before talking with her team about the news Allan gave her about the budget, Rebecca:

Answer	Rationale
a) Should have spoken with Allan about how to communicate the news to her team.	A manager should not hesitate to seek support or advice from others, especially in emotionally charged situations. Sometimes those who are at a slightly greater emotional distance can provide guidance that is more objective and has less distorting effects of negative reactions.
b) Should have taken a sick day, gone home, and set a meeting for the next morning, after she had calmed down with a good night's sleep.	Avoiding a difficult conversation or meeting usually only increases your stress levels. It also wouldn't be fair to keep the whole team worrying about the news. Furthermore, with an unresolved stressful situation on her mind, Rebecca probably wouldn't have relaxed and slept well anyway, and would have returned to work in an even worse emotional state. In emotionally charged moments, it can be helpful to give people a little time to cool down, but unnecessarily postponing action leads to ineffective management.
c) Should have had a one-on-one conversation with the most trusted member of her team to make a game plan for how to approach the meeting.	It wouldn't have been fair to isolate one team member to face this pressure, and it might have put that person in an awkward position. The other team members could easily perceive it as Rebecca making a special deal with one person, trying to buy support in a difficult situation. Furthermore, speaking privately with one team member might just be a way to postpone the inevitable group meeting, and would have been an ineffective way for Rebecca to address her anxiety. She would also have to ask herself whether she was trying to use personal connections to defuse the blame she might face from the group.

3. When meeting with her team and providing them with the news about the MacDonald-Thompson project, Rebecca:

Answer	Rationale
a) Should have explained that she personally did not agree with Allan's concerns about the numbers.	This strategy of "finding a common enemy" is not a good way to build a strong team, and it would be disrespectful to Allan. Rather than focusing negative emotions on a scapegoat, Rebecca needed to direct her team's energy toward seeking a solution to the project budget problem. If she disagreed with Allan's concerns, she should have told him in person.

Answer	Rationale
b) Should have apologized for the overly positive messages she gave her team previously.	Rebecca appears to have misinterpreted the strength of the project in terms of budget, and her confidence led her to give positive feedback that was unwarranted. Apologizing for her handling of the situation would be appropriate and would help build the trust and confidence of her team. Managers often worry that apologies make them look weak, but actually it's the fear of admitting when you're wrong that demonstrates weakness. Apologizing when appropriate helps increase the loyalty and engagement of your team and shows that you know you're not infallible.
c) Should have emphasized that the quality of the proposal was the most important thing, and that the numbers were much less important.	This would have been misleading. A great project is only great if it fits within all necessary parameters, including budget. It would be disrespectful of her team not to be fully candid about the negative news from Allan. Rebecca would also seem as though she is fearful of taking any blame for the situation, acting as a cheerleader for the team even in a genuinely troublesome situation, and thereby trying to make Allan look like the "bad guy" rather than accepting that there were legitimate weaknesses in the report.

4. When Rebecca gave the news to her team, and began to see the range of emotional reactions, she should have:

Answer	Rationale
a) Told the team that it was important to not become emotional, as this setback was just part of doing business.	This approach would not be helpful, because it would invalidate the team's emotional experiences. It would, in fact, probably exacerbate the team's emotional reactions, and make them angry at Rebecca for not accepting their natural human responses to a difficult situation.
b) Prefaced what she said by letting the team know they would likely be unhappy with the news and that they might have a range of different reactions.	By stating right from the beginning that they would be likely to have a range of emotional reactions to her news, Rebecca would not only validate and convey respect for the team's emotions, but would also help soften the blow. Accepting and even encouraging open communication about negative emotions would help the team get past them and back to work on salvaging their project.

Answer	Rationale
c) Ended the meeting sooner, as soon as she noticed emotions escalating.	Avoiding or deflecting an emotional situation due to your own discomfort rarely allows you to escape it unscathed. Rather, the problem only becomes worse because those involved feel as though they are not being supported. Ending a meeting to avoid negative emotions sends the message that those emotions are unwanted and invalid.

Conclude the Workshop by...

- Answering any outstanding questions or items in the “parking lot”.
- Encouraging the participants to review other modules in the *Managing Mental Health Matters* program.
- Letting them know where they can get more organizational specific policies or procedures.
- Thanking them for attending and letting them know who they can call if they have additional questions or if they would like to receive additional training.

PRE-WORK EMAIL – EPISODE 1 MANAGING EMOTIONS

Subject: Learn how to manage your employees' workplace emotions

Dear _____:

Dealing with distressed employees can be one of the greatest challenges any manager faces. Your role as a manager can feel particularly demanding when, in addition to the full range of regular tasks, you have to manage workers who exhibit what may at times be intense emotional states or demanding mental health issues.

To help you with this challenge and more effectively manage your employees' emotions, you are invited to attend an interactive workshop. Please join me on _____ (date) from ___ to ___ (time) in the _____ (meeting room).

During this workshop you will learn how to implement strategies to deal more effectively with employees who display anger, crying, defensiveness, or who are sad or withdrawn.

Visit the online learning tool *Managing Mental Health Matters* (MMHM) [insert hyperlink].

Set aside 30 to 45 minutes to watch ALL of the video segments and complete the quiz. Our discussion will focus on this information.

Print your Participant's Workbook, and complete the pre-work exercise. Remember to bring the workbook to the workshop. Come prepared to discuss your ideas.

It is suggested that you complete the self-assessment quiz [insert hyperlink]. It takes 10 to 15 minutes to complete, results are not shared and the quiz is not saved or tracked. The quiz only needs to be completed once, but you may be reminded of it in the pre-work emails you receive for other episodes in the MMHM workshops.

I look forward to working with you on _____ (date). If you have any questions regarding this workshop, please contact me at _____ (phone number) or by email at _____ (email address)

Best regards,

PARTICIPANT'S WORKBOOK – EPISODE 1 MANAGING EMOTIONS

The goal of this workshop is to help you implement strategies to deal more effectively with employees who display anger, crying, defensiveness, sad or withdrawn behavior.

Pre-work Exercise – Dos and Traps to Avoid

This exercise will raise your awareness of the skills you need as a manager to effectively handle emotional situations in the workplace.

Based on your experience and from what you observed in the videos, what skills are needed when dealing with emotionally charged situations at work?	What traps should managers AVOID when managing emotions in the work place?

Active Listening

There are three key skills associated with active listening:

Empathizing:

Taking an empathetic approach – one where you try to put yourself in the other person’s shoes, and where you communicate that to others – is often helpful in getting employees in touch with their feelings or attitudes. It requires you to be sensitive to the feelings expressed and it helps you help the person get in touch with his or her feelings or attitudes. Empathizing creates rapport, opens the lines of communication and encourages discussion and further sharing. For example... “It must be very frustrating for you when...”

Paraphrasing or Clarifying:

Unlike repeating back exactly what was said, paraphrasing involves rewording what was said into your own words and asking the employee a question to ensure accuracy and understanding. It is also an effective means of communicating that you are listening and interested in what the employee is saying. A paraphrasing or clarifying statement often starts with... “If I understand you correctly, you think....” and ends with a clarifying question, such as... “Did I get that right?”.

Pausing:

Pausing requires you to stop talking without filling the void of silence.

A few tips to help you purposefully pause:

- Bite the inside of your cheek!
- Count to 10 silently.
- Take a sip of water.
- Take a few deep breaths.

Exercise – Think. Pair. Share.

It is human nature to make judgments and assumptions about people, especially in emotionally charged situations. We need to take the time to listen actively so we understand the employee’s perspective before we share our views.

Working individually, take one to two minutes to complete the chart below:

Active Listening Skill	How this skill could help diffuse emotion
Empathizing	

Paraphrasing and Clarifying	
Pausing	

Dealing with Challenging Workplace Situations

General Strategies

Maintain realistic expectations for interactions with distressed employees. While you may not be able to fix the problem, you can offer support and help to diffuse the situation.

There are five general strategies to remember when dealing with employees' emotions at work. Record these below as we discuss them:

1. Give the employee time to calm down.
2. _____
3. _____
4. _____
5. _____

Scenarios

What follows are some examples of common emotionally charged situations of employees experiencing distress. In groups, discuss and record ways to deal with your assigned situation.

Sad or Withdrawn Employee

An average employee suddenly appears to be avoiding contact with peers and looks visibly sad. This employee is not crying and has not said anything about his or her situation.

Emotionally Charged (Angry) Employee

An employee who was passed over for a promotion has been slamming drawers, giving one word answers and is often sarcastic.

Fearful or Panicky Employee (when presented with negative feedback)

When asked to change a report, this employee begins to turn red, clenches his or her jaw, looks away and says very little.

Emotionally Upset (Crying) Employee

A co-worker tells you he or she overheard an employee crying.

Episode Quiz

Working individually or in pairs, review and circle one response for each question. Be prepared to share your rationale for the answer you choose.

Episode Quiz

1. When Rebecca met with Allan and received news about her team’s latest numbers:

Answer	Rationale
a) She should have asked Allan to communicate the message to her team.	
b) She should have asked Allan to reconsider his position, given that she had communicated to her team how well they had been doing.	
c) She should have told Allan how upset she was by the news.	

2. Before talking with her team about the budget news, Rebecca:

Answer	Rationale
a) Should have spoken with Allan about how to communicate the news to her team.	
b) Should have taken a sick day, gone home, and set a meeting for the next morning, after she had calmed down with a good night's sleep.	
c) Should have had a one-on-one conversation with the most trusted member of her team to make a plan for how to approach the meeting.	

3. When meeting with her team and providing them with the news about the MacDonald-Thompson project, Rebecca:

Answer	Rationale
a) Should have explained that she personally did not agree with Allan's concerns about the numbers.	
b) Should have apologized for the overly positive messages she gave her team previously.	

c) Should have emphasized that the quality of the proposal was the most important thing, and that the numbers were much less important.	
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4. When Rebecca gave the news to her team, and began to see the range of emotional reactions, she should have:

Answer	Rationale
a) Told the team that it was important to remain neutral, since this setback was just a part of doing business.	
b) Prefaced what she said by letting the team know they would likely be unhappy with the news and that they might have a range of different reactions.	
c) Ended the meeting sooner, as soon as she noticed emotions escalating.	

Resources

Record resources mentioned in this workshop that you may want to use in the future:

FACILITATOR'S GUIDE – EPISODE 2

MANAGING ACCOMMODATION

This workshop has been designed for experienced facilitators with management experience. However, you do not need to be a mental health expert to conduct these workshops. The program is designed for a group of approximately eight to 20 participants. If your group is larger or smaller than this, you may need to make some minor changes to the exercises and adjust the timing accordingly.

When conducting the exercises, if any questions or situations arise that cannot be dealt with immediately, or are beyond your level of knowledge/expertise, put them in a “parking lot”, an area designated for questions or comments not directly related to the current discussion. You can then address them at the end of the workshop. If there is insufficient time to deal with these during the workshop, or if you require time to research an answer, let the participants know you will follow up after the session is over.

The episode quiz at the end of the workshop is optional. Complete it if time permits.

In order to prepare for this workshop, set aside approximately 60 to 75 minutes.

Advance Preparation Checklist

To prepare to facilitate this workshop, please complete the following:

- Review the Leader's Guide and the Participant's Workbook, and add relevant examples and additional insights based on your management experience.
- Review all video clips associated with *Managing Accommodation*.
- Review the pre-work email and prepare to customize it prior to distribution in advance of the workshop.
- Book the meeting space.
- Send invitations to attendees.

One to two weeks in advance of the workshop

- Distribute the customized pre-work assignment and the PDF of the Participant's Workbook to participants.
- Ask participants to bring their workbooks with them to the workshop.
- Two to three days prior to the workshop, remind participants to complete the pre-work assignment.
- Consider which policies, procedures or resources are relevant to the session you will be holding and have material available that answers the following questions:
 - What is this organization's policy with regard to accommodating employees?
 - How should we approach an individual when we think an accommodation may be needed?
 - How do or should we respond to an employee in crisis?
 - What is this organization's process for developing an accommodation plan?
- Prior to the workshop, distribute the resource material through the pre-work email.
- Bring a few extra copies of the Participant's Workbook with you to the session.

Supplies Needed

- One flipchart, paper, markers
- Timer or watch to track time
- Name tags or tent cards and markers
- Computer, speakers, internet access (optional)

Detailed Workshop Agenda

Task	Exercise	Approximate Timing
Introduction	Welcome Participants Share Learning Objectives and Agenda	5 minutes
Pre-work Assignment	To Ask or Not to Ask...	15 minutes
Small Group Exercise	Communication Skills 101	10 minutes
Video or Real Life Application	Developing an Accommodation Plan	20 minutes
Quiz (time permitting)	Episode Quiz	5 minutes
Wrap-up		5 minutes

Facilitation Tips

As you are an experienced facilitator, we have only highlighted suggestions below on how to deal with possible disruptive behaviours. Ideally, during your introduction, you may want to set courtesy rules. State your expectations for involvement such as respecting other people's opinions and only one person talking at a time. Acknowledge that participants may have different levels of experience in managing accommodation. Don't take disruptive behaviour personally. Intervene only if necessary.

A participant that strongly or often disagrees

- Refer to the courtesy rules.
- Don't get involved in a power struggle – agree to disagree and move on.
- Speak and act confidently.
- Use direct eye contact.
- Manage your own emotions
- Be succinct.
- Empathize but don't agree.
- Ask for more information, if necessary.

A participant that becomes angry or verbally aggressive

- Refer to the courtesy rules.
- Adopt a respectful, relaxed posture and use a firm but calm tone.
- Try to uncover the participant's concern.
- Focus on a solution.
- Establish boundaries – state that verbal abuse will NOT be tolerated.

A participant that remains very quiet and does not participate

- Have participants work in pairs or small groups (think. pair. share.).
- Encourage responses by using open-ended questions and direct eye contact.
- Pause, and give participants time to think.
- Smile, and be encouraging and approachable.
- Provide positive reinforcement when participation occurs.
- Understand that not everyone needs to interact to learn.

A participant that rambles

- Ask closed questions to prevent long, drawn out responses.
- Listen carefully and bridge back to the topic by gently interrupting.
- Decrease eye contact.
- Consider assigning the person the role of time keeper.

Participants who disrupt

- Stand near a disruptive participant.
- Ask questions to colleagues close to disruptive participants.
- Stop talking; the silence will speak louder than their words.
- Ask the group if they can hear you.
- Refrain from asking disruptive participants to share their conversation

Preparation Checklist for Day of the Workshop

- Distribute name tags or tent cards
- Have extra copies of the Participant's Workbook available
- Prepare Agenda flipchart
 - Introduction
 - Pre-work Exercise – To Ask or Not to Ask...
 - Communication Skills 101 for Employees in Crisis
 - Developing an Accommodation Plan
 - Episode quiz
 - Wrap-up
- Prepare the Accommodation Plan flipchart.
 - Identify the needs of all parties.
 - Creatively collaborate on possible strategies.
 - Affirm the agreement, address misunderstandings, discuss a process to problem solve.
 - Document.

Introduction – Five Minutes

Engage your audience with a relevant story or anecdote. Welcome everyone, introduce yourself, state your credentials and put the following in your own words...

- Managers need to be aware of what may be necessary or prudent when providing workplace accommodations.
- There is a legal duty to offer reasonable accommodation when an employee is living with a disability.
- Even when the law is not engaged, reasonably accommodating staff can provide opportunities for maximizing productivity.
- Knowing the opportunities and limitations will allow managers to be as effective as possible with all employees.

Remind participants they are attending the workshop to learn how to:

- Engage employees in customizing an accommodation plan that is right for them.

Show agenda on pre-prepared flipchart.

Transition to the pre-work exercise.

Pre-work Exercise: To Ask or Not to Ask... – 15 minutes

This exercise is divided into two parts. Part A provides a forum to review questions discussed in the video, as well as additional questions participants may have regarding how to accommodate an employee in crisis. Part B will review what questions managers are legally allowed to ask an employee in crisis.

Instructions for Pre-work Exercise Part A: To Ask or Not to Ask...

- Ask if any questions raised in the video require clarification.
- If you receive responses that aren't directly related to the discussion or if you don't know the answer, put them in the "parking lot" and get back to the participants after the workshop.
- As you debrief the exercise, suggest that participants make notes in the answer column of their workbooks on page 34.

Questions reviewed in the video	Additional information
How much time off is the employee allowed to take?	<p>Varies. Because individuals recover and are ready to return to work at various rates, the answer is not always clear.</p> <p>When workplace issues are resolved, employees anticipate returning and often return sooner</p> <p>Your company policy outlines the amount of time allowed off, pay and how long you should keep the job available.</p>
Do people take time off work right after talk of performance issues?	<p>People often don't realize they aren't coping until a performance issue comes up. So the two might be related but not necessarily.</p>
What do I say to staff if we accommodate the employee?	<p>You can't discuss an employee's personal or medical information with other staff. From a management point of view, it's important that co-workers know that you believe that the need for the accommodation is valid and fair. The way you present this information to them can shape their responses.</p> <p>If some employees continue to doubt that the employee's issues are real, you might ask them how is it affecting them personally and what they need to move forward professionally with their co-worker.</p>

Questions reviewed in the video	Additional information
How long do I have to accommodate for?	Accommodations continue for as long as necessary and can be accomplished without any undue hardship to the employer. For mental health related accommodation, it's much more about conversation, interaction, communication and focus, which are helpful on an ongoing basis and doesn't cost a lot. As for job tasks related to mental health issues, the accommodations usually only last a few months during the graduated return to work, but that all depends on the individual's medical needs.
What about the employee's work while he or she is off?	Engage the staff in being part of the solution. Instead of delegating the work, you might get the staff involved in brainstorming solutions that work well for everyone. You might decide that you need some temporary help if your budget can afford it.
If the employee takes time off work, should I contact him or her?	<p>We know that when an employee feels completely disconnected that a return to work is often more difficult. Staying connected by email, flowers, cards or calls is important. The situation is complicated when you don't know the reason for the absence or whether the employee wants to hear from you. Even if his or her absence is conflict or stress related, keeping in touch can improve an employee's motivation by maintaining a sense of belonging.</p> <p>It's ideal to let the rest of the staff know that it's your policy to keep in touch with employees when they are off because you still see them as part of the team, even though they can't come to work.</p>
Do I accommodate, manage performance or take disciplinary action?	There is something called the "rule out rule". Before assuming an issue at work is a performance or disciplinary matter, rule out the possibility that there is an underlying health condition that needs to be accommodated rather than managed or disciplined.

Questions reviewed in the video	Additional information
How involved is his or her family doctor?	Some doctors often wonder why the workplace doesn't take a more proactive role in helping support an employee's return to work, and many in the workplace wonder why the doctor doesn't just take care of everything. The truth is we often don't know much about medical care and doctors often don't know much about the workplace. The real answer is that doctors outline medical limitations that need to be considered during the return to work planning. It's our job to address workplace issues and to determine how to accommodate medical limitations.

Instructions for Pre-work Exercise – Part B: To Ask or Not to Ask...

- Ask: "What questions or issues are you not allowed to ask an employee based on what you learned in the video or from your own experience?"
- Refer to the chart below and provide clarification as necessary.

Questions managers can't ask	Additional information
What is the employee's diagnosis? Is it serious? Has he or she had the problem for a while? Is this related to his or her home situation? Was his or her illness caused by work?	All these questions would be considered a violation of privacy and may not even be relevant to the employee's success at work.

Summarize and transition to the next exercise.

Exercise 2 – Communication Skills 101 for Employees in Crisis – 10 minutes

The goal of this exercise is to provide a forum for participants to discuss three key communication skills, as these relate to helping an employee in crisis.

Instructions for Communication Skills 101 Exercise

- Create three teams of five participants or less. Add additional teams if you have more than 15 participants.
- Assign one topic to each team and give them five minutes to discuss and strategize their ideas in their Participant's Workbook starting on page 35.
- Ask each team to report on their ideas and ask other teams to add ideas or comment.
- Clarify, as necessary, using the facilitator notes below.

1. Listening

Listen for understanding – Active listening is hard work and requires skill. When dealing with a person with mental health issues, what challenges might you face when trying to listen attentively?

- Active listening is a difficult skill to master even in regular conversations.
- Your own emotions, stressors and preoccupation with other issues, both personal and work related, may get in the way.
- Your personal feelings about the employee's past performance may colour your view.
- Your desire to fix the problem by telling rather than listening and asking.
- Employee may become defensive, angry, cry or withdraw.

Summarize – it is very important to sincerely try to understand not just what the person says but what they mean. Giving someone the safety and space to articulate and then clarify or correct what was said means you have a much better chance of understanding his or her perspective. Try very hard to stay focused on the individual and his or her agenda, not your own.

What are some strategies you could implement to overcome these challenges?

- Be aware that you're listening.
- Keep your voice calm and reassuring.
- Observe the employee's body language and reflect, in a non-judgmental way, what you are seeing and hearing.
- If you have not done so already, participate in the *Managing Emotions* workshop in the *Managing Mental Health Matters* program or access the videos online.

2. Distinguishing Validation from Agreement

Because each person has different needs and views, there will always be some conflict in living and working with others. By listening and acknowledging what you hear, but not necessarily agreeing with the person, you can open the door for continued discussion. What other benefits could result from acknowledging the other person's thoughts and feelings?

- Employees will feel heard and as a result may be more inclined to express their feelings and concerns.
- It may uncover other issues that also need to be addressed.
- By validating but not agreeing, you remain neutral which puts you in a better problem solving position.

3. Communicating without Judgment

Often when we are listening to what people are saying, we will have an emotional response and make judgments or assumptions about the intent and meaning of the message. These judgments often lead us to respond in a way that fuels mistrust and conflict. What can we do to avoid a potential impasse in difficult conversations?

- Turn down our internal dialogue and stay focused on what is being said.
- Breathe and neutralize our emotions.
- Listen and encourage alternative perspectives.
- Stay calm and focused on the situation rather than on personal characteristics of the employee.
- Watch the employee's body language and voice and be very aware of our own body language and voice.
- Move from judgment to curiosity by asking questions to gain a better understanding.
- State your observations and experience using specific examples.
- Share your perspectives, needs, desires, and constraints.
- Give the employee permission to tell you if he or she thinks he or she has not been fairly heard.
- Reframe the problem to a mutual, objective statement.

Exercise 3 – Developing an Accommodation Plan – 20 minutes

All emotions, thoughts and behaviours stem from needs. Most problems and conflicts in the workplace result from needs that are not satisfied.

Refer to your pre-prepared flipchart that lists the suggested steps managers can take to resolve problems and develop a plan to accommodate an employee who is struggling with a mental health issue. These steps, as they appear in the Participant’s Workbook on page 36 are listed below:

1. Identify the needs of all parties.
2. Creatively collaborate on possible strategies to ensure that the most important needs of all parties are met in a mutually agreeable way.
3. Affirm the agreement, address any misunderstandings and discuss a process for handling problems in the future, if necessary.
4. Document the agreement, providing all parties with a copy.

State: This approach is particularly effective when an employee’s concentration, perception or memory is compromised.

Instructions for Developing an Accommodation Plan

There are two options for this exercise. Option A involves showing one of the videos and leading a discussion. Option B is to ask participants to reflect on several questions related to the four-step plan process.

If you have time and a computer with an internet connection, you could do both options.

Instructions for Option A – Video

- Cue up video.4 to one third of the way through where John begins his discussion with Mark. Play the clip. At the end of the clip, give participants one to two minutes to reflect and record notes on the chart on page 36 of their workbooks.
- Debrief using the chart below.
- If time permits, ask participants if they agree or disagree with the steps needed to create an accommodation plan or if they would alter any of these steps.
- Comment or clarify as necessary.

Developing an Accommodation Plan – Video Version

Step	How (or did) John implement this step with Mark?
1. Identify the needs of all parties.	<ul style="list-style-type: none">• John was aware that Mark’s co-workers were not supportive of Mark and he acknowledged the need to get staff to be more supportive.• He asked twice, “Is there anything else that is problematic?”.• To encourage Mark to continue, John empathized saying, “that must feel awful”.

2. Creatively collaborate on possible strategies to ensure that the most important needs of all parties are met in a mutually agreeable way.	<ul style="list-style-type: none"> John reflected back his understanding of what needs to be addressed.
3. Affirm the agreement, address any misunderstandings and discuss a process for handling the problems in the future, if necessary.	<ul style="list-style-type: none"> John reflected back his understanding of the situation. He stressed the need to get Mark's input to address the issues. Set a time to meet again and asked Mark to record his concerns and possible solutions.
4. Document the agreement, providing all parties with a copy.	<ul style="list-style-type: none"> This was not covered in the video clip.

Instructions for Option B – Developing an Accommodation Plan for Real Life

- Put participants into groups with a maximum of four people per group.
- Give participants seven to 10 minutes to complete the table.
- Debrief using the chart below.
- If time permits, ask participants if they agree or disagree with these steps or if they would alter any of these steps. Comment or clarify as necessary.

Step	How to implement the step...
1. Identify the needs of all parties.	<p>Who else may you want to connect with, other than the employee in crisis?</p> <ul style="list-style-type: none"> Your manager Employee's co-workers Employee's direct reports, if relevant HR Department regarding policies and procedures <p>What questions might you want to ask the employee and the other people you listed above?</p> <ul style="list-style-type: none"> What challenges are you having at work at the moment? How is this affecting your ability to do your job? How is this situation impacting you? What support do you need from me, your co-workers, direct reports, HR? Ask, "Is there anything else?".

Step	How to implement the step...
<p>2. Creatively collaborate on possible strategies to ensure that the most important needs of all parties are met in a mutually agreeable way.</p>	<p>What management skills might you need to draw on when implementing this step?</p> <ul style="list-style-type: none"> • Active listening skills. • Ability to problem solve. • Knowledge of corporate policies and procedures. • Ability to delegate since some of the unwell employee's work may need to be given to others. • Negotiation skills. <p>Why is this step in the accommodation process so critical?</p> <ul style="list-style-type: none"> • Making the unwell employee and peers part of the solution is critical for getting agreement and better ensures the plan getting implemented.
<p>3. Affirm the agreement, address any misunderstandings and discuss a process for handling the problems in the future, if necessary.</p>	<p>What might happen if you skip this step?</p> <ul style="list-style-type: none"> • Everyone may not have been listening actively so there could be misunderstandings. • Having a problem solving process is critical to ensure timely action can be taken. • Participants in the discussion might forget the details or what was agreed upon. Having an agreement that everyone helped developed could result in the employee returning to work sooner and more successfully. • Relationships within the department are preserved or possibly strengthened.
<p>4. Document the agreement, providing all parties with a copy.</p>	<p>Why is this step important?</p> <ul style="list-style-type: none"> • Prevents misunderstandings. • May be required for legal reasons should the employee eventually need to be terminated.

Episode Quiz

Instructions for the Episode Quiz

- Ask participants to individually read the questions starting on page 38 of the workbook.
- Once everyone has completed the quiz, review each question asking for a show of hands to get an idea of which answer the participants chose.
- Review the rationale for the correct answer using the chart below.

1. In this episode, John's offer to give Mark half the day off may not have been the most appropriate response because:

Answer	Rationale
a) He did not seek to understand the cause of Mark's distress.	Mark said he did not want to talk about it, so there was no way for John to understand his distress.
b) The co-workers may resent having to assume Mark's responsibilities.	While this may be true, it should not serve as the sole basis for John's decision-making.
c) Mark may have interpreted the permission to go home as evidence that he is seen as the problem.	This could be true. It might have been better to ask the employee what he felt would be best for him at that moment.

2. Rebecca should not have discussed the behaviours of an employee with a health condition with the manager, John.

Answer	Rationale
True	Workplace behaviours are within the realm of management responsibilities and should be discussed as necessary for resolution of issues. When the discussion crosses over to personal medical information, the discussion may be a violation of human rights.
False	Correct. Same rationale as above.

3. The duration for which an employer is obligated to accommodate an employee is:

Answer	Rationale
a) Until the employee is feeling well again.	Like other chronic or episodic illnesses, it may be necessary to keep some of the accommodations in place after the employee feels well in order to help prevent a relapse.
b) As long as medically necessary, or until such point that it is proven that an undue burden exists on the employer.	Correct. Like all accommodations, this is true for mental health disabilities too.
c) Longer than most physical disabilities.	This is not necessarily true. Some mental health issues last weeks or months while others occur episodically across a lifetime.

4. The “rule out rule” implies that managers/employers should:

Answer	Rationale
a) Protect employees with mental illnesses against the pressures of changes such as transfers or promotions.	It may be considered discrimination to deny a promotion or transfer to an employee on the basis of a disability. In addition, depending on the situation, it is possible that these changes could have a positive effect on mental health.
b) Not consider performance management when employees have a mental illness.	Supportive performance management can assist a person with a mental illness stay on track, especially after an accommodation is in place.
c) Rule out the existence of underlying health conditions before disciplining.	Correct. Although discipline or performance management may be warranted, the “rule out rule” simply suggests that before you start down this path, you consider the possibility that a health condition is causing the behaviours you are witnessing.

Conclude the Workshop by...

- Answering any outstanding questions or items in the “parking lot”.
- Encouraging the attendees to review other modules in the *Managing Mental Health Matters* program.
- Letting participants know where they can get more organizational specific policies or procedures.
- Thanking them for attending and letting them know who they can call if they have additional questions or if they would like to receive additional training.

PRE-WORK EMAIL – EPISODE 2 MANAGING ACCOMMODATION

Subject: Learn how to accommodate an employee in crisis

Dear _____:

Managers need to be aware of what may be necessary or prudent when providing workplace accommodations. There is a legal duty to offer reasonable accommodation when an employee is living with a disability. Even when the law is not engaged, reasonably accommodating staff can provide opportunities for you to maximize productivity. Knowing the opportunities and limitations will allow you to be as effective as possible with all employees.

To help you with this challenge and more effectively manage accommodations, you are invited to attend an interactive workshop to discuss how to accommodate an employee in crisis. Please join me on _____ (date) from ___ to ___ (time) in the _____ (location/meeting room).

During this workshop you will learn how to engage the employee in developing the accommodation plan to allow for his or her commitment to its success.

Visit the online learning tool *Managing Mental Health Matters* (MMHM) [insert hyperlink].

Set aside 30 to 45 minutes to watch ALL of the video segments and complete the quiz. Our discussion will focus on this information.

Print your Participant's Workbook and complete the pre-work exercise. Remember to bring your workbook to the workshop. Come prepared to discuss your ideas.

It is suggested, that you complete the self-assessment quiz [insert hyperlink]. It takes about 10 to 15 minutes to complete, results are not shared and the quiz is not saved or tracked, but you may be reminded of it in the pre-work emails you receive for other episodes in the MMHM workshops.

I am looking forward to working with you on _____ (date). If you have any questions regarding this workshop, please contact me at _____ (phone number) or by email at _____ (email address).

Best regards,

PARTICIPANT'S WORKBOOK – EPISODE 2 MANAGING ACCOMMODATION

The goal of this workshop is to help you engage your employees in developing an accommodation plan, when one is necessary, to encourage their commitment to its successful implementation.

Pre-work Exercise – To Ask or Not to Ask...

Part A. This exercise will help you get answers to questions you have regarding the need to accommodate employees whose performance may be affected by a mental health issue, such as depression, anxiety, burnout and stress. List below, in the left column, questions you have that may differ from those raised in the *Managing Accommodation* video clips. Drawing on your management experience with employees who are not in crisis, we will discuss how basic management principles can be applied or modified when dealing with an employee in crisis.

Questions regarding accommodating an employee in crisis	Answers/additional information

Part B. Based on what you learned from the *Managing Accommodation* video clips, and from your own management experience, note below what you can and cannot ask an employee in crisis.

Exercise 2 – Communication Skills 101 for Employees in Crisis

Managing employees with mental health issues requires good communication skills. Three skills needed are:

- Listening for understanding
- Distinguishing validation from agreement
- Communicating without judgment

As instructed, work as a team to discuss the use of these skills when dealing with an employee in crisis.

Listening for understanding – Active listening is hard work and requires skill. When dealing with a person with mental health issues, what challenges might you face when trying to listen attentively?

What are some strategies you could implement to overcome these challenges?

Distinguishing Validation from Agreement

Because each person has different needs and views, there will always be some conflict in living and working with others. By listening and acknowledging what you hear, but not necessarily agreeing with the person, you can keep the discussion continuing. What other benefits could result from acknowledging the other person's thoughts and feelings?

Communicating without Judgment

Often when we are listening to what people are saying, we have an emotional response and make judgments or assumptions about the intent and meaning of the message. These judgments often lead us to respond in a way that fuels mistrust and conflict. What can we do to avoid a potential impasse in difficult conversations (e.g., turn down our internal dialogue and stay focused on what is being said)?

Exercise 3 – Developing an Accommodation Plan

All emotions, thoughts and behaviours stem from needs. Most problems and conflicts in the workplace result from needs that are not satisfied.

Here are steps you could take to resolve challenges and develop a plan to accommodate an employee who is struggling at work because of a mental health issue:

- Identify the needs of all parties.
- Creatively collaborate on possible strategies to ensure that the most important needs of all parties are met in a mutually agreeable way.
- Affirm the agreement, address any misunderstandings and discuss a process for handling the problems in the future, if necessary.
- Document the agreement, providing all parties with a copy.

This approach is particularly effective when an employee’s concentration, perception or memory is compromised.

As a group, review these steps and discuss how they could be applied when dealing with an employee in crisis. Be prepared to share your thoughts about these steps and if you would alter any of them.

Developing an Accommodation Plan – Option A – Video Segments

Step	How (or did) John implement this step with Mark?
1. Identify the needs of all parties.	
2. Creatively collaborate on possible strategies to ensure that the most important needs of all parties are met in a mutually agreeable way.	
3. Affirm the agreement, address any misunderstandings and discuss a process for handling the problems in the future, if necessary.	
4. Document the agreement, providing all parties with a copy.	

Option B – Developing an Accommodation Plan – Real Life

Step	How to Implement the Step...
<p>1. Identify the needs of all parties.</p>	<p>Who else may you want to connect with, other than the employee in crisis?</p> <p>What questions might you want to ask the employee and the other people you listed?</p>
<p>2. Creatively collaborate on possible strategies to ensure that the most important needs of all parties are met in a mutually agreeable way.</p>	<p>What management skills might you need to draw on when implementing this step?</p> <p>Why is this step in the accommodation process so critical?</p>

Step	How to Implement the Step...
3. Affirm the agreement, address any misunderstandings and discuss a process for handling the problems in the future, if necessary.	What might happen if you skip this step?
4. Document the agreement, providing all parties with a copy.	Why is this step important?

Episode Quiz

You will work individually. Review the questions below and pick the answer you think is best. During the debriefing session, indicate which response you chose by raising your hand.

1. In this episode, John's offer to give Mark half the day off may not have been the most appropriate response because:

Answer	Rationale
a) He did not seek to understand the cause of Mark's distress.	
b) The co-workers may resent having to assume Mark's workload.	
c) Mark may have interpreted the permission to go home as evidence that he is seen as the problem.	

2. Rebecca should not have discussed the behaviours of an employee with a health condition with the manager, John.

Answer	Rationale
True	
False	

3. The duration for which an employer is obligated to accommodate an employee is:

Answer	Rationale
a) Until the employee is feeling well again.	
b) As long as medically necessary or until such point that it is proven that an undue burden exists on the employer.	
c) Longer than most physical disabilities.	

4. The “rule out rule” implies that managers/employers should:

Answer	Rationale
a) Protect employees with mental illnesses against the pressures of changes such as transfers or promotions.	
b) Not consider performance management when employees have a mental illness.	
c) Rule out the existence of underlying health conditions before disciplining.	

Resources

Record resources mentioned in this workshop that you may want to use in the future:

FACILITATOR'S GUIDE – EPISODE 3

MANAGING PERFORMANCE

This workshop has been designed for experienced facilitators with management experience. However, you do not need to be a mental health expert to conduct these workshops. The program is designed for a group of approximately eight to 20 participants. If your group is larger or smaller than this, you may need to make some minor changes to the exercises and adjust the timing accordingly.

When conducting the exercises, if any questions or situations arise that cannot be dealt with immediately, or is beyond your level of expertise, put them in a “parking lot”, an area designated for questions or comments not directly related to the current discussion. You can then address them at the end of the workshop. If there is insufficient time to deal with these, let the participants know you will follow up with them after the session is over.

In order to prepare for this workshop, set aside approximately 60 to 75 minutes.

Advance Preparation Checklist

To prepare to facilitate this workshop, please do the following:

- Review this Leader's Guide and the Participant's Workbook and add relevant examples and additional insights based on your management experience.
- Review all the video clips associated with *Managing Performance*.
- Review the pre-work email and customize it prior to distribution in advance of the workshop.
- Book the meeting space.
- Send invitations to attendees.

One to two weeks in advance of the workshop

- Distribute the customized pre-work assignment and the PDF of the Participant's Workbook to participants.
- Two to three days prior to the workshop, remind participants to complete the pre-work assignment.
- Consider which organizational policies, procedures or resources are relevant to the session you will be holding and have material available that answers the following questions:
 - What is our standard performance management process and how does this differ from what is outlined in this module?
 - How do you consider mental health issues before beginning discipline?
- Prior to the workshop, distribute the resource material through the pre-work email.
- Bring a few extra copies of the Participant's Workbook with you to the session.

Supplies Needed

- One flipchart, paper, markers
- Timer or watch to track time
- Name tags or tent cards and markers
- Blank pieces of paper for the episode quiz – four pieces of paper for each team created
- One marker per team
- Copies of situation hand-outs from page 47 and 48 in Facilitator's Guide

Detailed Workshop Agenda

Task	Exercise	Approximate Timing
Introduction	Welcome Participants Share Learning Objectives and Agenda	5 minutes
Pre-work Assignment	Rule Out Rule	5 minutes
Team Challenge	Episode Quiz	10 minutes
Managing Performance Issues	Sharing Best Practices	30 minutes
Review	Finish This	5 minutes
Wrap-up		5 minutes

Facilitation Tips

As you are an experienced facilitator, we have only highlighted suggestions below on how to deal with possible disruptive behaviours. Ideally, during your introduction you may want to set some courtesy rules. State your expectations for involvement such as respecting other people's opinions, and only one person talking at a time. Acknowledge that participants may have different levels of experience in managing performance in the workplace. Don't take disruptive behaviour personally. Intervene only if necessary.

A participant that strongly or often disagrees

- Refer to the courtesy rules.
- Don't get involved in a power struggle – agree to disagree and move on.
- Speak and act confidently.
- Use direct eye contact.
- Manage your own emotions.
- Be succinct.
- Empathize but don't agree.
- Ask for more information, if necessary.

A participant that becomes angry or verbally aggressive

- Refer to the courtesy rules.
- Adopt a respectful, relaxed posture and use a firm but calm tone.
- Try to uncover the participant's concern.
- Focus on a solution.
- Establish boundaries – state that verbal abuse will NOT be tolerated.

A participant that remains very quiet and does not participate

- Have participants work in pairs or small groups (think. pair. share.).
- Encourage responses by using open-ended questions and direct eye contact.
- Pause, and give participants time to think.
- Smile, and be encouraging and approachable.
- Provide positive reinforcement when participation occurs.
- Understand that not everyone needs to interact to learn.

A participant that rambles

- Ask closed questions to prevent long, drawn out responses.
- Listen carefully and bridge back to the topic by gently interrupting.
- Decrease eye contact with this participant.
- Consider assigning the person the role of time keeper.

Participants who disrupt

- Stand near a disruptive participant.
- Ask colleagues close to disruptive participant questions.
- Stop talking; the silence will speak louder than their words.
- Ask the group if they can hear you.
- Refrain from asking disruptive participants to share their conversation.

Preparation Checklist for Day of the Workshop

- Prepare copies of the answer page.
- Distribute name tags or tent cards.
- Have extra copies of the Participant's Workbook available.
- Prepare Agenda flipchart.
 - Introduction
 - Pre-work Exercise – "Rule Out Rule"
 - Team Challenge – Episode Quiz
 - Managing Performance Issues
 - Finish This
 - Wrap-up
- Prepare Episode Quiz Team Challenge

Team #	Answer	Rationale
1		
2		

Introduction – Five Minutes

Engage your audience with a relevant story or anecdote. Welcome everyone, introduce yourself, state your credentials and put the following in your own words...

- Acknowledge that addressing performance issues with an employee can be uncomfortable and stressful, and even more difficult when an employee is experiencing emotional distress.
- Yet, it is at these times where a skilled manager can make a difference in the outcomes for the employee, the manager and the organization.
- One important concept of this episode is that helping an employee who may be experiencing depression, anxiety, stress or burnout to stay productive at work can actually help him or her maintain a sense of value and competence.
- If done correctly, supporting an employee to remain a contributing member of the team is often a better, healthier approach than simply taking away tasks.
- Feeling valued goes a long way in maintaining and protecting mental health at work.

Remind participants why they're attending the workshop:

- To proactively and collaboratively develop strategies to deal with performance issues that stem from employee depression, anxiety, stress and burnout.

Show agenda on pre-prepared flipchart.

Transition to the pre-work exercise.

Pre-work Exercise – The “Rule Out Rule” – Five minutes

The goal of this exercise is to ensure everyone understands what the “rule out rule” is and under what circumstances it should be applied.

Instructions for the Pre-work Exercise: The “Rule Out Rule”

- Refer participants to page 51 of their Participant's Workbook.
- Ask them to pair with a partner to share their understanding of the “rule out rule”.
- Ask one or more groups to give their interpretation of the rule.
- Debrief/clarify as necessary using the definition below.

The “Rule Out Rule” Definitions – Although discipline or performance management may be warranted, the rule out rule simply suggests that before you start disciplining, you first consider the possibility that a health condition is causing the behaviors you are witnessing.

Exercise 2 – Episode Quiz Team Challenge – 10 minutes

The goal of this exercise is to provide a forum for discussion of the challenging performance management situations that are addressed in the video.

Instructions for Episode Quiz Team Challenge

- Form participants in teams of two or three.
- Distribute blank sheets and a marker to each team.
- Give teams five to 10 minutes to review the questions and decide on the best answer.
- Record their responses.
- Have teams decide on a spokesperson.
- Debrief the exercise, referring to the chart below.
- Award one point for the correct answer and one point for the correct rationale.
- Track the points and applaud the team(s) who scored the most points.

1. Asking an employee returning from disability leave to participate in planning for a successful return to work:

Answer	Rationale
a) Is normally too burdensome for the employee who is just coming back.	If an employee is well enough to return to work, he or she should be well enough to participate in a discussion about what will impact his or her success and sustainability of his or her return.
b) Engages and empowers the employee to focus on solutions unique to their own needs.	Correct. This can be a first step towards a sustainable return to work.
c) May encourage the employee to cherry-pick the duties she or he would prefer to do at work.	When an employee can begin with those tasks or duties that he or she feels he or she can be successful at, and then build towards the more onerous or tedious tasks, the early wins can help build confidence and competence.

2. A manager asking an employee his or her preferences regarding how direction and feedback are provided:

Answer	Rationale
a) Transfers control of the work situation to the employee.	The employer/manager's responsibility is to control the work situation. This approach allows the employee to control only how feedback is given, rather than whether or what feedback is provided.
b) Demonstrates a spirit of respect and collaboration likely to result in a win-win outcome.	Correct. Every employee is motivated a little differently. Understanding how to provide direction and feedback in a way that can be heard without defensiveness or resistance is beneficial to both parties.
c) May make it difficult to manage performance should issues arise late.	Understand how best to provide direction and feedback should help you address future issues more effectively.

3. Focusing the performance management on solutions rather than problems:

Answer	Rationale
a) Risks never getting to the cause of the problem.	We may never know the real cause of conflict, especially if it is rooted in mental health issues, but getting to the solution is the point of performance management.
b) Avoids dealing with past problems.	This approach deals with the past problems by focusing on the solution that will avoid repeating these problems.
c) Can be a way to reduce blaming and conflict.	If handled well, this approach has the potential to focus everyone's attention on how to create positive change.

4. In the video, George's poor performance:

Answer	Rationale
a) Should be cause to consider the "rule out rule".	Correct. George's poor performance is one example of when to rule out a health condition before beginning discipline.
b) Needs to be understood by his manager.	Although attempting to understand the employee is good management practice, it is not always possible if the employee does not wish to discuss his or her situation. And it is not always necessary in order to focus the discussion on workplace solutions.
c) If allowed to continue, could lead to a problematic work environment.	This is a possibility if the employee's behavior begins to negatively affect co-workers. This is one reason that early interventions can be best for all concerned.

Exercise 3 – Sharing Ideas – Managing Performance Issues – 30 minutes

The goal of this exercise is to generate discussion and share ideas on how to handle performance issues that are linked to the employee's depression, anxiety or stress and burnout.

Instructions for Sharing Ideas – Managing Performance Issues

- Form groups of three to four.
- Refer the participants to the scenario on page 53.

Round 1

- Ask the groups to appoint a recorder. They should discuss the case and be prepared to share their ideas – 10 minutes.
- Let everyone know they must take notes as they will be teaching someone else in Round 3.

Round 2

- Once everyone is finished, pass out suggested answers which are on the last two pages in this Facilitator's Guide. Ask teams to compare their ideas to the ones provided by you. Encourage them to ask for any necessary clarification. – Five minutes

Round 3

- Pair participants with someone who worked on the other case. If a team is short one participant, form a group of three.
- Participants share their case with a new colleague who worked on the other case – 10 minutes.

Round 4

- Lead a general Q&A session as necessary – Five minutes.

Situation 1 – Mary is an administrative assistant who is responsible for supporting three busy middle managers, of which you are the most senior. She has always been very responsible and reliable. Lately, she has been taking an increasing amount of time off work. She no longer makes eye contact with people and you noticed recently that she has lost weight. One day last week, you noticed her eyes were red and her face blotchy, presumably from crying. You asked her what was wrong but she refused to talk about it. You are aware of two serious mistakes she made recently that have caused significant problems and headaches for a few employees, including you. It's time to address the situation.

1. Should you implement disciplinary action? If so, what action would you take?
 - Not yet. This is an example of when you would invoke the rule out rule as she may be suffering from anxiety, depression or another mental illness. This first needs to be ruled out.
2. If she refuses to tell you what's wrong, what can you do to support her?
 - Listen actively.
 - Use empathy to encourage her to talk.
 - Be patient.
 - Remain calm and objective.
 - Pause and give her time to think and respond.
 - You need to try to understand her perspective. Let her know, in a sincere tone, that you want her to be successful.
 - Enlist her help to give you ideas as to what support she needs from you or others to be successful.
3. Should you discuss the situation with the other two managers or others in the office to get their impressions of how best to help Mary?
 - It would be appropriate to speak to the other two managers to brainstorm a strategy that you could propose to Mary. It would be important to approach Mary with an open mind and be willing to adjust the plan based on her input.
 - It would not be appropriate to speak to Mary's co-workers about her health issues. If her frequent sick time is negatively affecting other staff, then it would be important to solicit the input of the other staff to develop a plan to assume Mary's work in her absence.

Situation 2 – Bruce, a sales representative on your team, has until recently always been the “life of the party”. Well liked by everyone, Bruce is a better than average performer who has always met and sometimes exceeded his sales performance numbers. About five weeks ago, there was a position open in Marketing and two people on your team applied. Although both were good candidates, the hiring manager picked Bruce’s colleague Suzanne instead of Bruce. Ever since then, Bruce has been very “down” and uncommunicative. Despite having reassured him a few times that there will be other opportunities, Bruce is not buying it. He has called in sick a few times, which is very unusual. His sales are dropping and he is getting more and more negative about everything. You are concerned that his behavior is beginning to demoralize the team. It’s time to address the situation.

1. Should you implement disciplinary action? If so, what action would you take?
 - Not yet. This is an example of when you should consider invoking the “rule out rule” as he may be suffering from anxiety, depression or another mental illness.
2. If he refuses to tell you what’s wrong, what can you do to support him?
 - Listen actively.
 - Use empathy to encourage him to talk.
 - Be patient.
 - Remain calm and objective.
 - Pause and give him time to think and respond.
 - You need to try to understand his perspective. Let him know, in a sincere tone, that you want to help him be prepared when the next opportunity arises.
 - Enlist his help to give you ideas as to what support he needs to be successful next time.
3. Should you discuss the situation with your boss, the manager in Marketing who overlooked him for the promotion or the other sales representatives on your team to get their impressions of how best to help Bruce?
 - It may be appropriate to speak to your boss to see if she could provide you with some additional ideas or approaches. Whatever the two of you decide should be positioned with Bruce as only one option and that you would prefer he provide his own ideas. It would be important to approach Bruce with an open mind to adjust the plan based on his input.
 - It would not be appropriate to speak to Bruce’s peers or to the manager who chose Suzanne instead. The decision is made. Now you have to support Bruce in whatever way you can to try to help him to be more successful next time.

Exercise 4: Finish This – Five minutes

The goal of this exercise is to help the participants transfer what they learned in this workshop to the workplace.

Instructions for Finishing This Exercise:

- Complete if time permits or encourage participants to complete this exercise on their own after the workshop.
- Refer participants to page 54.
- Working individually, ask participants to complete the phrases in their workbooks.

The phrases in the Participant’s Workbook are...

- Today’s hottest idea/tip for me was....
- An opportunity to improve how I manage performance is...
- One idea I am committed to putting into practice is...

Summarize by saying that the key to managing the performance of an employee who is in crisis is to enlist his or her help to address or resolve the issue.

Conclude the Workshop

- Answer any outstanding questions or items in the “parking lot”.
- Encourage the attendees to review other modules in *Managing Mental Health Matters* program.
- Let participants know where they can get more organizational-specific policies or procedures.
- Thank them for attending and letting them know who they can call if they have additional questions or if they would like to receive additional training.

PRE-WORK EMAIL – EPISODE 3 MANAGING PERFORMANCE

Subject: Learn how to manage common performance issues

Dear _____:

Addressing performance issues with an employee can be uncomfortable and stressful at the best of times. This can particularly be the case when the employee is experiencing emotional distress. Yet, it is especially at these times where performance management skills can make a difference in the outcomes for the employee, the manager and the organization. Helping an employee who may be experiencing depression, anxiety, stress or burnout to stay productive at work can actually help him or her maintain a sense of value and competence. If done correctly, supporting an employee to remain a contributing member of the team is a better, healthier approach than simply taking away tasks. Feeling valued goes a long way in maintaining and protecting mental health at work.

To help you with this challenge and more effectively manage your employees' performance, you are invited to attend an interactive workshop to discuss how to manage performance issues that may be the result of employee's depression, anxiety, stress or burnout. Please join me on _____ (date) from ____ to ____ (time) in the _____ (location/meeting room).

During this workshop you will learn:

- What the "rule out rule" is and how and when to apply it in the workplace
- How to apply our company's performance management process to common workplace performance issues

Visit the online learning tool *Managing Mental Health Matters* (MMHM) [insert hyperlink]. Set aside 30 to 45 minutes to watch ALL of the video segments. Our discussion will focus on this information.

Print your Participant's Workbook and complete the pre-work exercise noting what you think the "rule out rule" is and when and how to apply it in the workplace. Remember to bring your workbook with you to the workshop. Come prepared to discuss your ideas.

It is suggested that you complete the self-assessment quiz [insert hyperlink]. It takes about 10 to 15 minutes to complete, results are not shared and the quiz is not saved or tracked. The quiz only needs to be completed once, but you may be reminded of it in the pre-work emails you receive for other episodes in the MMHM workshops.

I look forward to working with you on _____ (date). If you have any questions regarding this workshop, please contact me at _____ (phone number) or by email at _____ (email address).

Best regards,

PARTICIPANT'S WORKBOOK – EPISODE 3 MANAGING PERFORMANCE

The goal of this workshop is to help you proactively and collaboratively develop strategies to deal with performance issues that stem from employee depression, anxiety, stress/burnout.

Pre-work Exercise – The “Rule Out Rule”

After accessing this link and watching the videos on *Managing Performance*, note below what your understanding of the “rule out rule” is and under what circumstances you should invoke this rule:

Exercise 2 – Team Challenge – Episode Quiz

Select a team spokesperson. Working as a team, review each question and the possible options. As a team, select what you think is the best course of action. Be prepared to explain your rationale for your choice. The goal is to score a total of eight points. You will earn one point for each correct answer and one point for the correct rationale.

1. Asking an employee returning from disability leave to participate in planning for a successful return to work:

Answer	Rationale
a) Is normally too burdensome for the employee who is just coming back.	
b) Engages and empowers the employee to focus on solutions unique to their own needs.	
c) May encourage the employee to cherry-pick the duties she or he would prefer to do at work	

2. A manager asking an employee his or her preferences regarding how direction and feedback are provided:

Answer	Rationale
a) Transfers control of the work situation to the employee.	
b) Demonstrates a spirit of respect and collaboration likely to result in a win-win outcome.	
c) May make it difficult to manage performance should issues arise later.	

3. Focusing the performance management on solutions rather than problems:

Answer	Rationale
a) Risks never getting to the cause of the problem.	
b) Avoids dealing with past problems.	
c) Can be a way to reduce blaming and conflict.	

4. In the video, George's poor performance:

Answer	Rationale
a) Should be cause to consider the "rule out rule".	
b) Needs to be understood by his manager.	
c) If allowed to continue, could lead to a problematic work environment.	

Exercise 3 – Sharing Ideas – Managing Performance Issues

The goal of this exercise is to generate discussion and share ideas on how to handle performance issues that are linked to the employee’s depression, anxiety and stress/burnout.

Round 1 – Work with your colleagues to review the mini-case and answer the questions associated with the situation. Everyone should take notes as you will share your ideas with someone else in Round 3.

Round 2 – The facilitator will provide you with some suggested ideas. Compare these ideas to what you discussed and augment your approach, if necessary.

Round 3 – You will pair with someone who worked on the other case. Share your case and ideas with your colleague.

Round 4 – Q&A session (if needed)

Situation 1 – Mary is an administrative assistant who is responsible for supporting three busy middle managers, of which you are the most senior. She has always been very responsible and reliable. Lately, she has been taking more and more time off work. She no longer makes eye contact with people and you noticed recently that she has lost weight. One day last week, you noticed her eyes were red and her face blotchy, presumably from crying. You asked her what was wrong but she refused to talk about it. You are aware of two serious mistakes she made recently that have caused significant problems and headaches for a few employees, including you. It’s time to address the situation.

1. Should you implement disciplinary action? If so, what action would you take?

2. If she refuses to tell you what’s wrong, what can you do to support her?

3. Should you discuss the situation with the other two managers or others in the office to get their impressions of how best to help Mary?

Situation 2 – Bruce, a sales representative on your team, has until recently, always been the “life of the party”. Well liked by everyone, Bruce is a better than average performer who has always met and sometimes exceeded his sales performance numbers. About five weeks ago, there was a position open in Marketing and two people on your team applied. Although both were good candidates, the hiring manager picked Bruce’s colleague Suzanne instead of Bruce. Ever since then, Bruce has been very “down” and uncommunicative. Despite having reassured him a few times that there will be other opportunities, Bruce is not buying it. He has called in sick a few times, which is very unusual. His sales numbers are dropping and he is getting more and more negative about everything. You are concerned that his behavior is beginning to demoralize the team. It’s time to address the situation.

1. Should you implement disciplinary action? If so, what action would you take?

2. If he refuses to tell you what's wrong, what can you do to support him?

3. Should you discuss the situation with your boss, the manager in Marketing who overlooked him for the promotion or the other sales representatives on the team to get their impressions of how best to help Bruce?

Exercise 4 – Finish This

Reflect on what you learned in this workshop and finish the following phrases:

- Today's hottest idea/tip for me was....
- An opportunity to improve how I manage performance is...
- One idea I am committed to putting into practice is...

Resources

Record resources mentioned in this workshop that you may want to use in the future:

FACILITATOR'S GUIDE – EPISODE 4

MANAGING CONFLICT

This workshop has been designed for experienced facilitators with management experience. However, you do not need to be a mental health expert to conduct these workshops. The program is designed for a group of approximately eight to 20 participants. If your group is larger or smaller than this, you may need to make some minor changes to the exercises and adjust the timing accordingly.

When conducting the exercises, if any questions or situations arise that cannot be dealt with immediately, or is beyond your level of expertise, put them in a “parking lot”, an area designated for questions or comments not directly related to the current discussion. You can then address them at the end of the workshop. If there is insufficient time to deal with these during the workshop, let the participants know you will follow up with them after the session is over.

The episode quiz at the end of the workshop is optional. Complete it if time permits.

In order to prepare for this workshop, set aside approximately 60 to 75 minutes.

Advance Preparation Checklist

To prepare to facilitate this workshop, please do the following:

- Review the Leader's Guide and the Participant's Workbook and add relevant examples and additional insights based on your management experience.
- Review all the video clips associated with *Managing Conflict*.
- Review the pre-work email and customize it prior to distribution in advance of the workshop.
- Book the meeting space.
- Send invitations to attendees.

One to two weeks in advance of the workshop:

- Distribute the customized pre-work assignment and the PDF of the Participant's Workbook.
- Ask participants to bring the workbook with them to the workshop.
- Two to three days in advance of the workshop, send a reminder to the participants to complete the pre-work assignment.
- Prior to the workshop, distribute the resource material through the pre-work email.
- Bring a few extra copies of the Participant's Workbook with you to the session.

Supplies Needed

- One flipchart, paper, markers
- Timer or watch to track time
- Name tags or name tent cards and markers
- Paper for exercise – the quantity required will depend on the group's size

Detailed Workshop Agenda

Task	Exercise	Approximate Timing
Introduction	Welcome Participants Share Learning Objectives and Agenda	5 minutes
Pre-work Assignment	Dealing with Employees in Conflict	10 minutes
Application	Real Life Situations	30 minutes
Solidification Exercise	Bump	10 minutes
Wrap-up	Episode Quiz (time permitting)	5-10 minutes

Facilitation Tips

As you are an experienced facilitator, we have only highlighted suggestions below on how to deal with possible disruptive behaviours. Ideally, during your introduction, you may want to set some courtesy rules. State your expectations for involvement such as respecting other people's opinions, and only one person talking at a time. Acknowledge that participants may have different levels of experience in managing conflict in the workplace. Don't take disruptive behaviour personally. Intervene only if necessary.

A participant that strongly or often disagrees

- Refer to the courtesy rules.
- Don't get involved in a power struggle – agree to disagree and move on.
- Speak and act confidently.
- Use direct eye contact.
- Manage your own emotions.
- Be succinct.
- Empathize but don't agree.
- Ask for more information, if necessary.

A participant that becomes angry or verbally aggressive

- Refer to the courtesy rules.
- Adopt a respectful, relaxed posture and use a firm but calm tone.
- Try to uncover the participant's concern.
- Focus on a solution.
- Establish boundaries – state that verbal abuse will NOT be tolerated.

A participant that remains very quiet and does not participate

- Have participants work in pairs or small groups (think. pair. share.).
- Encourage responses by using open-ended questions and direct eye contact.
- Pause, and give participants time to think.
- Smile, and be encouraging and approachable.
- Provide positive reinforcement when participation occurs.
- Understand that not everyone needs to interact to learn.

A participant that rambles

- Ask closed questions to prevent long, drawn out responses.
- Listen carefully and bridge back to the topic by gently interrupting.
- Decrease eye contact with this participant.
- Consider assigning the person the role of time keeper.

Participants who disrupt

- Stand near a disruptive participant.
- Ask colleagues close to disruptive participant questions.
- Stop talking; the silence will speak louder than their words.
- Ask the group if they can hear you.
- Refrain from asking disruptive participants to share their conversation.

Preparation Checklist for Day of the Workshop

- Distribute name tags or tent cards.
- Have extra copies of the Participant's Workbook available.
- Prepare Agenda flipchart.
 - Introduction
 - Pre-work Exercise – "Dealing with Employees in Conflict"
 - Real Life Situations
 - Bump
 - Wrap-up
- Prepare Conflict Resolution Process flipchart.
 - Do not divulge any personal employee information.
 - Using active listening skills; meet separately with each employee to get the employee's viewpoint.
 - Ask for specific examples of what caused the conflict.
 - Ask for ideas on how to solve the problem.
 - Ask for a commitment to actively work on implementing the solutions generated.
- Prepare Conflict Situation flipchart - chart will be blank and completed during the workshop.

Introduction – Five Minutes

Engage your audience with a relevant story or anecdote. Welcome everyone, introduce yourself, state your credentials and put the following in your own words...

- Acknowledge that it is common for managers to notice that employees experiencing mental health challenges have difficulty maintaining healthy co-worker relationships.
- When one's mental health is out of balance, thoughts and perceptions can be distorted in such a way that it can feel like others are judging, criticizing, and/or threatening this employee or his or her work.
- At the same time, many individuals can experience self-doubt, low self-esteem, irritability and difficulties with memory and concentration.

Remind the participants they are here today to learn how to:

- Address conflict between employees in the workplace, in a timely manner, to prevent a worsening of the situation.
- Involve the conflicting parties in developing viable options to solve the problem.
- Secure agreement and commitment from the employees involved to increase the likelihood that they will follow through.

Show agenda on pre-prepared flipchart.

Transition to the pre-work exercise.

Pre-work Exercise – Dealing with Employees in Conflict – 10 minutes

The goal of this exercise is to familiarize the participants with a process for dealing with conflict between employees in the workplace.

Dealing with Employees in Conflict

- Refer participants to page 64 of the workbook. In approximately equal sized groups (two to four participants to a group), ask participants to share what they learned from the *Managing Conflict* video. If they did not watch the video, they can do the exercise based on experience or previous training.
- Record the ideas on the flipchart and recommend participants copy the ideas on page 64. Provide clarification as necessary using the pre-prepared Conflict Resolution Process flipchart.
- Do not divulge personal information about employees to other employees. (If necessary, explain why this is important from a legal point of view.)
- Using active listening skills, meet separately with each employee to get his or her viewpoint. Ask for specific examples of what caused the conflict.
- Ask for ideas on how to solve the problem.
- Ask for a commitment to actively work on implementing the solutions generated.

Exercise 2 – Real Life Situations – 30 minutes

The goal of this exercise is to provide a forum for the sharing and resolving of real life workplace situations.

Real Life Situations

- Give participants one to two minutes to individually think of “generic”, real-life conflict situations (page 64) they have had in the workplace. To maintain confidentiality, state that no names or details should be mentioned that could identify a specific employee.
- Capture these conflict situations on a flipchart.
- Have the group agree on the top four they want to explore.
- Divide participants into groups based on the number of scenarios. Have a maximum of four participants per team. Provide each team with a blank piece of paper.
- Give the teams five to 10 minutes to create a brief scenario based on their assigned conflict situation using a maximum of three to four sentences to describe the situation. The scenario should include enough detail that another team could apply the conflict resolution process to the scenario.
- The scenario should include:
 - Two main characters and their names
 - Position titles (if relevant)
 - What the conflict situation is from the perspective of both characters
 - The impact the situation is having on the characters and others
- Team recorder writes the scenario on the blank paper
- Ask the teams to pass their scenario to another team to resolve, using the process the group agreed to in the first exercise or refer to the Conflict Resolution flipchart – 10 minutes.
- As time permits, ask a few teams to present their scenario and how they applied the process to it. – 10 minutes
- Provide feedback/clarification as necessary

Exercise 3 – Bump – 10 minutes

The goal of this exercise is to solidify what participants learned and to consider what they will do differently to resolve workplace conflict.

Instructions for Bump Exercise:

- Ask participants to record their ideas on page 65. Have each group choose a group recorder.
- Pose this scenario, “you have been asked to mentor a new, junior manager on the tips and techniques you follow to resolve workplace conflict between employees”.
- Ask them to record as many tips and techniques as possible – give them five minutes to list their ideas.
- Duplicated ideas will be “bumped” off the list. Each team will earn one point for all ideas that are deemed original.

Note to Facilitator: If you don’t have sufficient time to complete the Bump exercise as described, conduct the exercise as a large group. Ask for volunteers to share the tips and techniques they have learned, on how to deal with workplace conflict especially that which is, at least in part, due to one or more of the employees experiencing a mental health issue.

Exercise 4 – Episode Quiz – (Time Permitting) – Five to 10 minutes

The goal of this exercise is to provide a forum for discussion of the conflict situations that were addressed in the video clips.

Instructions for Episode Quiz

- Direct participants to the quiz in their workbook on page 65.
- If time permits, ask participants to review and individually respond to each question.
- Conduct the exercise as a large group by reading the questions aloud and asking for a show of hands as to which answer option they prefer.
- Provide feedback as necessary using the “rationale” column below.

1. When Rebecca wrote a note to John advising that she’d received the impression that Samantha was having a few challenges:

Answer	Rationale
a) She may have violated confidentiality concerning Samantha’s medical condition.	Rebecca did not disclose personal medical information in her note, and speaking about an employee who may be struggling with challenges at work is within the scope of management’s responsibilities.
b) She showed reasonable concern and suggested a proactive approach to dealing with important potential barriers to Samantha’s successful return to work.	Correct. Ignoring potential barriers can allow the return to work to fail. In this scenario, management’s approach was to proactively help the employee be successful.
c) She assumed John was not competent to determine a reasonable course of action.	John is a new supervisor, but supporting employees with mental illnesses can be challenging for even seasoned managers. A ‘reasonable course of action’ depends on many things, including the employee/ manager relationship, past experiences and the employee’s current state of wellness.

2. Where possible, a return-to-work plan should be completed:

Answer	Rationale
a) By the treating physician.	In most cases, the physician would not have sufficient knowledge of the job or the workplace to determine an effective return-to-work plan. Although the physician may provide important information about functional limitations, the return-to-work plan should be completed by the employer and employee and their representatives (i.e., union, occupational health, human resources, vocational rehab, disability management).
b) By the manager at the time the employee returns to work.	Although the manager should be part of the return-to-work plan, he or she may not have enough expertise to develop the entire plan and the employee must also be involved.

Answer	Rationale
c) In collaboration among the employer and employee (and union if relevant).	Correct. While many may be involved in the development of the plan, including occupational health, human resources, vocational rehab or disability management, the employer, employee and union, if relevant, should be important participants.

3. Conflict that may have existed with co-workers and/or a supervisor prior to an employee's disability leave should be addressed prior to the return to work:

Answer	Rationale
a) By those still at work with an agreement to give the employee a fresh start.	Although getting co-workers to agree to let the conflict go may give the employee a fresh start, if the behaviours or problems are not addressed, the conflict can begin again. Helping all concerned to find a new way to interact is more effective long term.
b) Unless the returning employee is emotionally fragile.	This may be more important for employees who may be emotionally fragile. Unresolved conflict can increase stress and isolation for the returning employee.
c) Where the conflict could impair a successful and sustainable return to work.	Correct. When done without blaming or shaming anyone, but rather looking at a solution that allows all parties to progress towards a solution that involves a new way of interacting, the return to work is more likely to be sustainable.

4. Once it's clear what Samantha's needs are for successful return to work, John should:

Answer	Rationale
a) Inform Ann about the plan and tell her about her role.	There is a risk that Ann will resist being mandated to behave or act in a certain way without any consideration or discussion about her needs or feelings.
b) Have Rebecca talk to Ann about her behaviour towards Samantha so that future problems do not arise.	Using a third party (even if it is internal human resources) to resolve conflict among employees can potentially reduce the manager's influence and effectiveness. Where possible, the manager should consider having these conversations him or herself to build relationships.
c) Engage both employees in conversation aimed at clarifying needs and mutually agreeing to solutions.	Correct. This begins a pattern of effective communication among all parties and eventually allows the manager to withdraw while the employees continue to build a new working relationship.

Conclude the Workshop by...

- Answering any outstanding questions or items in the “parking lot”.
- Encouraging the attendees to review other modules in the *Managing Mental Health Matters* program.
- Letting participants know where they can get more organizational specific policies or procedures.
- Thanking them for attending and letting them know who they can call if they have additional questions or if they would like to receive additional training.

PRE-WORK EMAIL – EPISODE 4 MANAGING CONFLICT

Subject: Learn how to manage workplace conflict

Dear _____:

It is common for managers to notice that employees experiencing mental health challenges have difficulty maintaining healthy co-worker relationships.

When one's mental health is out of balance, thoughts and perceptions can be distorted in such a way that it can feel like others are judging, criticizing and/or threatening you and/or your work. At the same time, many individuals can experience self-doubt, low self-esteem, irritability and difficulties with memory and concentration.

To help you with this challenge and more effectively manage workplace conflict, you are invited to attend an interactive workshop to discuss how to manage workplace conflict between employees that stems from, or may be aggravated by, a potential mental health issue. Please join me on _____ (date) from ___ to ___ (time) in the _____ (location/meeting room).

During this workshop you will learn how to:

- Address conflict between employees in the workplace, in a timely manner, to prevent a worsening of the situation.
- Involve the conflicting parties in developing viable options to solve the problem.
- Secure agreement and commitment from the employees involved to increase the likelihood that they will follow through.

Visit the online learning tool *Managing Mental Health Matters* (MMHM) [insert hyperlink]. Set aside 30 to 45 minutes to watch ALL of the video segments. Our discussion will focus on this information.

Print your Participant's Workbook and complete the pre-work exercise by noting how the manager in the video manages workplace conflict between two employees. Remember to bring the workbook with you to the workshop. Come prepared to discuss your ideas.

It is suggested that you complete the self-assessment quiz [insert hyperlink]. It takes about 10 to 15 minutes to complete, results are not shared and the quiz is not saved or tracked. The quiz only needs to be completed once but you may be reminded of it in the pre-work emails you receive for other episodes in the MMHM workshops.

I am looking forward to working with you on _____ (date). If you have any questions regarding this workshop, please contact me at _____ (phone number) or by email at _____ (email address).

Best regards,

PARTICIPANT'S WORKBOOK – EPISODE 4 MANAGING CONFLICT

The goal of this workshop is to help you learn how to address conflict between employees in the workplace in a timely manner to prevent a worsening of the situation. You will also learn the importance of involving the conflicting parties in developing viable options to solve the problem. Securing agreement and commitment from the employees involved, to increase the likelihood that they will follow through, will also be explored.

Pre-work Exercise – Dealing with Employees in Conflict

The goal of this exercise is to familiarize you with a process for dealing with conflict in the workplace between employees. As you watch the *Managing Conflict* episode, note your observations and comments regarding how John dealt with the workplace conflict between Samantha and Ann. Come prepared to discuss your observations.

Notes:

Conflict Resolution Process:

1. _____
2. _____
3. _____
4. _____
5. _____

Exercise 2 – Real-Life Situations

The goal of this exercise is to provide a forum for sharing and resolving real-life workplace conflict situations.

While working individually, think of a few “generic” conflict situations you have had to manage. To maintain employee confidentiality, do not provide names or details that could identify a specific employee.

Notes:

Exercise 3 – Bump

The goal of this exercise is to help you solidify what you already know or have learned today regarding resolving workplace conflict.

Working together in assigned teams, pick a team recorder and record your ideas below.

Assume that you are teaching a new, junior manager, tips and techniques to help him or her resolve workplace conflict between employees.

Record as many tips and techniques as possible, noting that duplicated ideas will be “bumped” off the list. You’ll earn one point for all ideas that are deemed to be original. Include all ideas even the most basic.

Notes:

Episode Quiz

1. When Rebecca wrote a note to John advising that she’d received the impression that Samantha was having a few challenges:

Answer	Rationale
a) She may have violated confidentiality concerning Samantha’s medical condition.	
b) She showed reasonable concern and suggested a proactive approach to dealing with important potential barriers to Samantha’s successful return to work.	
c) She assumed John was not competent to determine a reasonable course of action.	

2. Where possible, a return-to-work plan should be completed:

Answer	Rationale
a) By the treating physician.	

Answer	Rationale
b) By the manager at the time the employee returns to work.	
c) In collaboration among the employer and the employee (and union if relevant).	

3. Conflict that may have existed with co-workers and/or a supervisor prior to an employee's disability leave should be addressed prior to the return to work:

Answer	Rationale
a) By those still at work with an agreement to give the employee a fresh start.	
b) Unless the returning employee is emotionally fragile.	
c) Where the conflict could impair a successful and sustainable return to work.	

4. Once it's clear what Samantha's needs are for successful return to work, John should:

Answer	Rationale
a) Inform Ann about the plan and her assigned role.	
b) Have Rebecca talk to Ann about her behaviour towards Samantha so that future problems do not arise.	
c) Engage both employees in conversation aimed at clarifying needs and mutually agreeing to solutions.	

Resources

Record resources mentioned in this workshop that you may want to use in the future:

FACILITATOR'S GUIDE – EPISODE 5

MANAGING RETURN TO WORK

This workshop has been designed for experienced facilitators with management experience. However, you do not need to be a mental health expert to conduct these workshops. The program is designed for a group of approximately eight to 20 participants. If your group is larger or smaller than this, you may need to make some minor changes to the exercises and adjust the timing accordingly.

When conducting the exercises, if any questions or situations arise that cannot be dealt with immediately, or is beyond your expertise, put them in a “parking lot”, an area designated for questions or comments not directly related to the current discussion. You can then address them at the end of the workshop. If there is insufficient time to deal with these during the workshop, let the participants know you will follow up with them after the session is over.

The episode quiz at the end of the workshop is optional. Complete it if time permits.

In order to prepare for this workshop, set aside approximately 60 to 75 minutes.

Advance Preparation Checklist

To prepare to facilitate this workshop, please complete the following:

- Review the Leader's Guide and Participant's Workbook, and add relevant examples and additional insights based on your management experience.
- Review all video clips associated with *Managing Return to Work*.
- Review the pre-work email and customize it prior to distribution in advance of the workshop.
- Book the meeting space.
- Send invitations to attendees.

One to two weeks in advance of the workshop:

- Distribute the customized pre-work assignment and the PDF of the Participant's Workbook.
- Ask participants to bring the workbooks with them to the workshop.
- Two to three days prior to the workshop, remind participants to complete the pre-work assignment. Consider which organizational policies, procedures or resources are relevant to the session you will be holding.
- Have the answers to the following questions:
 - What is or should be our process while someone is off work due to a mental health issue?
 - What is our standard return-to-work process and how does the approach outlined in these videos differ?
 - When do we begin discussion with the employee about return-to-work and what is the process?
 - What is the process if the return to work is not going well?
- You may wish to review the organization's return-to-work policies, procedures and resources the organization currently offers and distribute this information with the pre-work email.
- Bring a few extra copies of the Participant's Workbook with you.
-

Supplies Needed

- One flipchart, paper, markers
- Timer or watch to track time
- Name tags or tent cards and markers

Detailed Workshop Agenda

Task	Exercise	Approximate Timing
Introduction	Welcome Participants Share Learning Objectives and Agenda	5 minutes
Pre-work Assignment	I Discovered...	10 minutes
Application	Before, During and After	25 minutes
Solidification Exercise	Co-worker Reaction	15 minutes
Quiz – time permitting	Episode Quiz	5 minutes
Wrap-up		5 minutes

Facilitation Tips

As you are an experienced facilitator, we have only highlighted suggestions below on how to deal with possible disruptive behaviours. Ideally, during your introduction you may want to set some courtesy rules. State your expectations for involvement, such as respecting other people's opinions, and only one person talking at a time. Acknowledge that participants may have different levels of experience in managing an employee's return to work. Don't take disruptive behaviour personally. Intervene only if necessary.

A participant that strongly or often disagrees

- Refer to the courtesy rules.
- Don't get involved in a power struggle – agree to disagree and move on.
- Speak and act confidently.
- Use direct eye contact.
- Manage your own emotions.
- Be succinct.
- Empathize but don't agree.
- Ask for more information, if necessary.

A participant that becomes angry or verbally aggressive

- Refer to the courtesy rules.
- Adopt a respectful, relaxed posture and use a firm but calm tone.
- Try to uncover the participant's concern.
- Focus on a solution.
- Establish boundaries – state that verbal abuse will NOT be tolerated.

A participant that remains very quiet and does not participate

- Have participants work in pairs or small groups (think. pair. share.).
- Encourage responses by using open-ended questions and direct eye contact.
- Pause, and give participants time to think.
- Smile, and be encouraging and approachable.
- Provide positive reinforcement when participation occurs.
- Understand that not everyone needs to interact to learn.

A participant that rambles

- Ask closed questions to prevent long, drawn out responses.
- Listen carefully and bridge back to the topic by gently interrupting.
- Decrease eye contact with this participant.
- Consider assigning the person the role of time keeper.

Participants who disrupt

- Stand near a disruptive participant.
- Ask colleagues close to disruptive participant questions.
- Stop talking; the silence will speak louder than their words.
- Ask the group if they can hear you.
- Refrain from asking disruptive participants to share their conversation.

Preparation Checklist for Day of the Workshop

- Distribute name tags or tent cards.
- Have extra copies of the Participant's Workbook available.
- Prepare Agenda flipchart.
 - Introduction
 - I discovered...
 - Before, During and After
 - Co-worker Reactions
 - Episode Quiz - Time Permitting
 - Wrap-up

Introduction – Five minutes

Engage your audience with a relevant story or anecdote. Welcome everyone, introduce yourself, state your credentials and put the following in your own words...

- Effectively supporting an employee's return to work following a period of disability is an important function of a management role.
- When an employee returns to work after a long or short-term disability, he or she can feel nervous, vulnerable or full of self-doubt about his or her role at work, his or her ability to perform the role effectively and how his or her co-workers will respond.
- An employee recovering from a mental health issue or illness can have amplified fears related to the return to work for a number of reasons, including performance difficulties and interpersonal problems that may have existed prior to his or her leave.
- Because of the stigma and shame associated with mental illness, most individuals returning to work after disability leave will experience anxiety about anticipated questions from co-workers as to why they were off.

Remind participants they are here to learn how:

- A supervisor and employee should interact to develop a plan to ensure a successful return to work for the employee.
- How to manage co-worker reactions, such as curiosity, fear, frustration or hostility since those reactions influence the success of a return-to-work plan.

Show agenda on pre-prepared flipchart.

Transition to the pre-work exercise.

Pre-work Exercise: I Discovered... – 10 minutes

The goal of this pre-work exercise is to provide a framework for the participants to reflect on the videos and note the new or re-learned ideas they gained from watching the video segments.

- Ask participants to refer to their pre-work assignment.
- Ask for a volunteer to share the two statements he or she picked and how the sentences were completed; ask others as time permits.
- If time permits, ask each participant for a response to the following: “One question I have about creating a return-to-work plan with an employee is...”.

Here are the statements as they appear in the Participant’s Workbook:

I Discovered....

- One new idea/insight I discovered from these videos was...
- Something I knew previously that I re-learned was...
- I was surprised to learn...
- I had forgotten that...
- I noticed that...
- One question I have about creating a return-to-work plan with an employee is...

Exercise 2 – Before, During and After – 25 minutes

The goal of this exercise is to provide a forum to discuss what managers need to do before, during and after meeting with the returning employee to ensure the development of a successful return-to-work plan.

Before, During and After:

- Divide participants into groups with a maximum of four per group.
- Ask them to pick a group recorder.
- Give participants 10 minutes to discuss and record their ideas on the chart on page 78; encourage them to spend most of the time on the middle column.
- Use the chart below to debrief and augment their ideas, as necessary.

Before Meeting with the Employee	During the Meeting with the Employee	After meeting with the Employee
<ul style="list-style-type: none"> • Prepare yourself mentally and emotionally – you will need to remain calm and patient. • Check in with HR, if necessary, to learn the policies specific to your organization. • Plan questions you will ask and be aware of the ones you can't ask. 	<ul style="list-style-type: none"> • Listen actively. • Be aware of your body language; observe the employee's body language. • Arrange a quiet, private place to talk (unless the employee prefers otherwise). • Focus on and reiterate that your role is to help them be successful moving forward. • Be sure to involve the employee in developing the plan – ask for their ideas and opinions – be open to these. • Set aside sufficient time – don't appear distracted, annoyed, bored, etc. • At the end of the meeting confirm that you have a mutual understanding of next steps. • Thank the employee, be encouraging. • Express sincere confidence in their ability to implement the plan. • Encourage the employee to ask for your support as needed. 	<ul style="list-style-type: none"> • Document the discussion and share the document with the employee and others as per your corporate policy – e.g., your boss, HR, etc. • Follow through on the plan. • Check in regularly with the employee. • If you see signs he or she is "slipping", take action.

Exercise 3 – Co-worker Reaction – 15 minutes

Co-workers are likely to experience a variety of emotions when their colleague returns to work.

Instructions for Co-worker Reaction Exercise:

- Refer participants to the chart on page 79 of the workbook.
- If there is not enough time to complete the full chart, assign only one or two emotions to each team (otherwise have the teams complete the full chart).
- Debrief using the chart below.

Emotions/reactions co-workers are likely to experience when a colleague returns to work following a "sick leave" absence	Strategies to help employees deal with their emotions so they can support their co-worker's return to work
Curiosity	<ul style="list-style-type: none"> • Acknowledge that it is normal to be curious, however, you are unable to tell co-workers anything about the employee's condition without their expressed permission. • Encourage them to be welcoming to the returning employee but not to expect the employee to reveal anything about why they have been on leave.
Fear	<ul style="list-style-type: none"> • Many people are afraid of people who they suspect have a mental illness. • Provide them with resource tools and websites so they can learn how they can overcome their fear and support their co-worker. <i>www.workplacestrategiesformentalhealth.com</i>
Frustration	<ul style="list-style-type: none"> • Co-workers may be frustrated, especially if they have been burdened with extra work in the absence of their colleague. • Enlist the help of the co-workers to develop a plan together to ensure "extra" work is fairly distributed.
Hostility	<ul style="list-style-type: none"> • Co-workers may be hostile to the returning employee if they have been burdened with extra work in the absence of their colleague or if they feel this colleague has been granted "special" status or favours. • Enlist the help of the co-workers to develop a plan together to ensure "extra" work is fairly distributed and everyone is treated fairly.
Other?	

Exercise 4: Episode Quiz – Time Permitting

The goal of this exercise is to provide an opportunity to see how well the participants grasped the key concepts in the course.

Instructions for Episode Quiz

- Direct participants to the quiz in their workbook on page 79.
- If time permits, ask participants to review and individually respond to each question.
- Alternatively, conduct the exercise as a large group by reading the question and asking for a show of hands as to which answer option they prefer.
- Provide feedback as necessary using the “rationale” column below.

1. John is asking Samantha what reducing stressors means to her. This:

Answer	Rationale
a) Establishes a meaningful starting point for discussion around what will help her be successful in her return to work.	Correct. Everyone reacts differently to different stressors. For Samantha, it may be criticism, but for others a stressor may be isolation or too much noise. Understanding an individual’s particular needs means the manager is less likely to feel that everything can potentially be a stressor.
b) Crosses the boundary of privacy and confidentiality.	Workplace stressors are not personal medical information and are important manageable factors in workplace success.
c) Is a waste of time since stress will always be a part of any workplace.	While some stress is a fact of life, managing those factors that negatively impact employee productivity makes good business sense.

2. If John makes special arrangements with Samantha to reduce her stressors:

Answer	Rationale
a) He helps her to identify what she needs to be successful at work and to commit to a solution that she has developed.	Correct. Whenever we engage the employee in creating a solution, his or her commitment to its success is often much greater.
b) Other employees will want the same thing.	Although other employees may indeed want the same thing, accommodation of persons with disabilities is a duty rather than a preference. However, where a reduction in stressors supports better productivity and wellness and is cost-effective, you may want to consider how these or other changes could benefit other employees.
c) She will continue to have expectations that work should not be stressful.	Although it is impossible to predict her future expectations, by helping her to clearly establish her needs now, you reduce the chances that problems will continue to arise.

3. Samantha's co-workers, including Ann:

Answer	Rationale
a) Will welcome Samantha back.	Often in the case of a mental health leave, co-workers are unsure of what to say or do when the employee returns. As a result they may avoid the employee altogether. This can feel isolating to the employee, and management should discuss with the employee a way to facilitate a more comfortable re-integration for everyone.
b) Should be happy to help Samantha out with her work while she is getting back up to speed.	Often co-workers are busy enough and do not feel great about assuming extra work. This reality must be considered when discussing how work will be assigned during a transition time.
c) Need to be involved in a discussion about how their work or roles will be affected by Samantha's return to work.	Although privacy means not discussing personal medical information, an open discussion about the workplace, tasks and roles provides clarity and involves the co-workers in being part of the solution.

Conclude the Workshop by...

- Answering any outstanding questions or items in the "parking lot".
- Encouraging the attendees to review other modules in the *Managing Mental Health Matters* program.
- Letting them know where they can get more organizational specific policies or procedures.
- Thanking them for attending and letting them know who they can call if they have additional questions or if they would like to receive additional training.

PRE-WORK EMAIL – EPISODE 5 MANAGING RETURN TO WORK

Subject: Learn how to help an employee return to work

Dear _____:

Effectively supporting an employee's return to work following a period of disability is an important function of a management role. When an employee returns to work after a long or short-term disability, he or she can feel nervous, vulnerable or full of self-doubt about his or her role at work, his or her ability to perform a role effectively and how his or her co-workers will respond.

An employee recovering from a mental health issue or illness can have amplified fears related to the return to work for a number of reasons including performance difficulties and interpersonal problems that may have existed prior to the leave. Because of the stigma and shame associated with mental illness, individuals returning to work, after disability leave, may experience anxiety about anticipated questions from co-workers as to why they were off.

To help you with this challenge and more effectively manage return to work, you are invited to attend an interactive workshop to discuss how to help an employee return to work successfully. Please join me on _____ (date) from ___ to ___ (time) in the _____ (location/meeting room).

During this workshop you will learn how:

- A supervisor and employee should interact to develop a plan to ensure a successful return to work for the employee.
- How to manage co-worker reactions, including curiosity, fear, frustration or hostility that may influence the success of a return to work.

Visit the online learning tool *Managing Mental Health Matters* (MMHM) [insert hyperlink]. Set aside 30 to 45 minutes to watch ALL of the video segments. Our discussion will focus on this information.

Print your Participant's Workbook and complete the pre-work exercise by picking two phrases from those provided and completing the statements. Remember to bring your workbook with you to the workshop. Come prepared to discuss your ideas.

It is suggested that you complete the self-assessment quiz [insert hyperlink]. It takes about 10 to 15 minutes to complete, results are not shared and the quiz is not saved or tracked. The quiz only needs to be completed once, but you may be reminded of it in the pre-work emails you receive for other episodes in the MMHM workshops.

I look forward to working with you on _____ (date). If you have any questions regarding this workshop, please contact me at _____ (phone number) or by email at _____ (email address).

Best regards,

PARTICIPANT'S WORKBOOK – EPISODE 5 MANAGING RETURN TO WORK

The goal of this workshop is to help you learn how a manager and employee should interact to develop a plan to ensure a successful return to work for the employee. You will also learn how co-worker reactions, such as curiosity, fear, frustration or hostility, influences the success of a return-to-work plan for the employee.

Pre-work Exercise – I Discovered...

The goal of this exercise is to provide a framework for you to reflect on the video clips and note the new or re-learned ideas you gained from watching these videos.

Complete two phrases from the “I Discovered...” list below and be prepared to share your answers with the group:

I Discovered...

- One new idea or insight I discovered from these videos was...
- Something I knew previously that I re-learned was...
- I was surprised to learn...
- I had forgotten that...
- I noticed that...
- One question I have about creating a return-to-work plan with an employee is...

Notes:

Exercise 2 – Before, During and After

The goal of this exercise is to provide a forum to discuss what managers need to do before, during and after meeting with the employee to ensure the development of a successful return-to-work plan.

You will have only 10 minutes, working as a group, to complete the chart. It is recommended that you focus your time on the “during the meeting” column. We will debrief the exercise as a large group.

Before meeting with the employee	During the meeting with the employee (Specifically what steps you would take, or things you would want to keep in mind, when building a return-to-work plan with the employee.)	After meeting with the employee

Exercise 3 – Co-worker Reaction

Co-workers are likely to experience a variety of emotions when their colleague returns to work.

Working in teams, identify strategies to help the returning employee’s co-workers deal with their emotions.

As a group, we will discuss strategies you can implement to help your employees deal with their emotions and support their colleague.

Emotions/reactions co-workers are likely to experience when a colleague returns to work following a “sick leave” absence	Strategies to help employees deal with their emotions so they can support their co-worker’s return to work
Curiosity	
Fear	
Frustration	
Hostility	
Other?	

Exercise 4 – Episode Quiz

1. John is asking Samantha what reducing stressors means to her. This:

Answer	Rationale
a) Establishes a meaningful starting point for discussion around what will help her be successful in her return to work.	
b) Crosses the boundary of privacy and confidentiality.	
c) Is a waste of time since stress will always be a part of any workplace.	

2. If John makes special arrangements with Samantha to reduce her stressors:

Answer	Rationale
a) He helps her identify what she needs to be successful at work and to commit to a solution that she has developed.	
b) Other employees will want the same thing.	
c) She will continue to have expectations that work should not be stressful.	

3. Samantha's co-workers, including Ann:

Answer	Rationale
a) Will welcome Samantha back.	
b) Should be happy to help Samantha out with her work while she is getting back up to speed.	
c) Need to be involved in a discussion about how their work or roles will be affected by Samantha's return to work.	

Resources

Record resources mentioned in the workshop that you may want to use in the future:

MORE RESOURCES FOR MANAGING MENTAL HEALTH MATTERS IN YOUR ORGANIZATION



www.workplacestrategiesformentalhealth.com



Mental Health Commission of Canada's
A Leadership Framework for Advancing Workplace Mental Health.
www.mhccleadership.ca



Wor i It

www.workplacestrategiesformentalhealth.com/wti



www.guardingmindsatwork.ca



www.mentalhealthworks.ca



Also remember to check organizational resources or benefits you may offer related to workplace mental health such as:

- Employee Assistance Program
- Wellness
- Human Resources
- Employee Relations
- Intranet
- Occupational Health and Safety



www.mooodisorders.ca
