

MANAGING MENTAL HEALTH MATTERS



Leader's Guide for **MANAGING MENTAL HEALTH MATTERS**

Resources referred to in this guide are offered free of charge from the Great-West Life Centre for Mental Health in the Workplace at www.workplacestrategiesformentalhealth.com



Great-West Life
Centre for
Mental Health
in the Workplace

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ABOUT THE GREAT-WEST LIFE CENTRE FOR MENTAL HEALTH IN THE WORKPLACE

The Great-West Life Centre for Mental Health in the Workplace provides free, public resources including strategies, tools and support for research and initiatives aimed at improving workplace mental health for all Canadians. The Centre was established by The Great-West Life Assurance Company as part of its commitment to enriching communities across Canada.

Through its website at www.workplacestrategiesformentalhealth.com, employers can find a diverse collection of ideas and resources from a variety of sources designed to help enhance workplace mental health including:

- Mental Health Resources
- Psychological Health & Safety
- Prevention & Promotion
- Intervention & Accommodation
- Leadership & Management
- Featured Programs
- Resources by Workplace Roles

The Centre commissions research and the creation of new resources, such as:

- *Guarding Minds @ Work*[™], which offers practical, user-friendly tools to help employers identify and act on organizational issues that may affect employee mental health.
- *Working Through It*[™], a series of videos that speak directly to people struggling with mental health issues, sharing experiences of working through times of mental health pressures at work, off work and returning to work. It is also a great resource for awareness-building for supervisors, co-workers and others.
- *On the Agenda*, a series of interactive sessions for managers to engage their team in discussions about improving workplace mental health.

The work of the Centre is supported by Great-West Life's national corporate citizenship program, *Stronger Communities Together*[™].

Resources referred to in this guide are offered free of charge on the Centre's website at **www.workplacestrategiesformentalhealth.com**.

LEADER'S GUIDE TO IMPLEMENTING MANAGING MENTAL HEALTH MATTERS IN YOUR ORGANIZATION

INTRODUCTION

This guide is designed to assist you in putting the online learning tool *Managing Mental Health Matters* (MMHM) to work in your organization, assisting your staff in managing or supporting employees experiencing mental health issues. This resource helps you engage participants in applying and honing the skills gained from MMHM and allows you an opportunity to assess the level of competence by providing you with:

- Pre- & Post-Evaluations for you to administer
- Overview of key messages for each episode
- Questions to consider to modify the approach for your organization
- Supporting exercises to engage your participants for each episode
- Copies of online episode quizzes & answers
- Final quiz & answers

Note: We have used the terms 'managers' or 'participants' throughout for ease of reading, but union stewards, supervisors, occupational health professionals, human resources and others can also benefit from the approaches taught in these episodes.

Different MMHM episodes have been developed to assist you in managing mental health issues in the workplace. Each episode contains information and strategies that have been shown to work and are practical for most workplaces. Although each episode provides an interactive learning opportunity, the potential complexity of mental health issues in the workplace warrants supplementing the interactive learning with peer and/or one-on-one discussions about the material.

The episodes address the following:

- The duty to reasonably accommodate staff with a temporary or permanent mental disability such as depression or anxiety-related disorders.
- Developing effective and reasonable workplace accommodations when mental health is a factor.
- Engaging in supportive and effective management of employee performance or productivity when mental health may be a factor.
- Intervening and helping to resolve co-worker conflict in the workplace where one or both co-workers may be experiencing mental health issues.
- Managing our own emotional reactions while more effectively responding to the emotional distress of others at work.

Each online training episode:

- Can be completed within approximately 30 minutes
- Is self-guided, allowing for individual learning styles
- Has interactive storylines, making it more engaging
- Includes effective strategies based on research and existing practices
- Provides additional web-based resources to support enhanced learning
- Includes quizzes as a self-check measure to test your understanding of the material

Certificate of Completion

A Certificate of Completion template is included at the end of each Episode. You may want to present a certificate to each to participant when you are satisfied with the demonstrated competence in each area.

The certificates are on pages 15, 21, 26, 31 and 46, and you can download a printable copy from www.workplacestrategiesformentalhealth.com. You can choose to put your own organization's logo on the certificate to show that the training was done in-house.

Objective of Managing Mental Health Matters

The goal of the MMHM program is to increase the knowledge, comfort and ability in recognizing and managing issues related to mental health in the workplace. Changing the way we think about mental health in the workplace is a necessary part of this process. This shift in thinking is best achieved through the completion of the online learning episodes and group or one-on-one discussion about the information and concepts presented can help achieve this change.

Evaluation

In order to determine whether or not a participant absorbed the material, it is suggested that you have each participant complete the pre-evaluation before he or she begins MMHM and the post-evaluation after completing any additional training you will provide with this resource. The scores can then be compared to see where the participants may require additional training or support.

For example, if you had three people circle #2, and three people circle #4 for Question #1 on the pre-evaluation, the total score would be 3×2 , plus $3 \times 4 = 18$. This would result in an average score of 3 (18 divided by six participants).

If, on the post-evaluation, two people circle #5, two circle #6, and two circle #8, the total score would be 2×5 , plus 2×6 , plus $2 \times 8 = 38$. This would result in an average score of 6+ (38 divided by six participants). This would confirm a significant increase in comfort level, but also show that there is still room for improvement in the area. The pre-evaluation is on the next page, and the post-evaluation is included at the end of this resource.

Evaluating participants' use of the MMHM program can be useful in assessing their ability to work with employees who may be experiencing mental health issues and can also highlight areas for continued learning. MMHM includes quizzes at the end of each episode, as well as a final evaluation quiz (with answers) after completing all episodes.

Once participants have mastered this level of competence, they will be ready for you to take their learning to a higher level.

MANAGING MENTAL HEALTH MATTERS

PRE-EVALUATION

The following evaluation has been developed to measure your thoughts, feelings and behaviours related to managing mental health issues in your workplace. Please complete this evaluation prior to participating in the *Managing Mental Health Matters* program and again following successful completion of the training program.

For each of the questions below please rate your response based on the following scale:

1 = Not at all 5 = Somewhat/sometimes 10 = Absolutely

1. I am comfortable addressing mental health issues in the workplace.

1 2 3 4 5 6 7 8 9 10

2. I have the skills and strategies I need to approach a distressed employee.

1 2 3 4 5 6 7 8 9 10

3. I feel I can facilitate mutually agreed upon approaches when dealing with people and problems at work.

1 2 3 4 5 6 7 8 9 10

4. I believe that individuals with mental health issues are difficult to manage and work with.

1 2 3 4 5 6 7 8 9 10

5. I am aware of the signs and symptoms of mental health issues for individuals in the workplace.

1 2 3 4 5 6 7 8 9 10

6. I know how to reasonably accommodate an employee experiencing emotional distress or a mental health issue at work.

1 2 3 4 5 6 7 8 9 10

7. I understand the legal requirements for reasonably accommodating an employee who has a mental health-related disability.

1 2 3 4 5 6 7 8 9 10

8. I feel confident addressing performance issues with an employee I suspect may be dealing with a mental health-related issue.

1 2 3 4 5 6 7 8 9 10

9. I am skillful in resolving conflict between co-workers so that both employees are satisfied with the outcome.

1 2 3 4 5 6 7 8 9 10

10. I know the steps to take to assist an employee to return to work after a period of absence due to a mental health issue.

1 2 3 4 5 6 7 8 9 10

Name: _____

Date: _____

Dealing with Challenges to Implementation or Facilitation

You've decided that Mental Health Matters at your workplace...Now what?

First of all, congratulations! By committing yourself to implementing MMHM at your workplace, you are helping to foster a healthier workplace and prevent psychological harm. You recognize that managing people can be challenging, especially when they may be experiencing mental health issues such as depression, stress and anxiety. By providing training and support for managers to develop the skills and abilities to address and resolve issues at work, you can improve working lives.

Now that you've made the commitment to facilitate MMHM, this section of the Leader's Guide is intended to help you communicate effectively and collaboratively with your team or an individual. We recognize that facilitation is not something that comes easily for everybody, so here are some tips and strategies that you may want to consider when facilitating:

- **Be prepared:**
 - Consider which organizational policies, procedures or resources are relevant to the session you will be holding and have copies at hand.
 - Review the learning objectives, questions to consider and quiz questions related to the episode.
 - Choose the activity you wish to engage in, and ensure you have any necessary materials related to that activity.
 - If relevant for your organization, appoint someone to take minutes and distribute them to the group following the session.
 - Ensure you have a meeting room that allows for collaboration among all members of your group.
- **A hands-on experience:** It is important to remember that most people learn better by doing than by being told what to do. The video modules in MMHM allow participants to take the time they need to absorb the information at their own pace and have their own moments of discovery. When you host the live sessions, facilitate to encourage as much interaction and dialogue as possible to help them "own" the results of your session.
- **Being heard:** While you are the person facilitating, it is important to let others have the floor as well. Ask a lot of questions and seek to ensure that participants are hearing what you are saying. More importantly, make sure that you're listening – and that participants see that you're listening – by restating the question, answer or idea that is brought forward in your own words. Be sure to ask participants (or whoever makes a comment) if you understood their words correctly. If they say no, invite them to restate their question or comment. Remember that when nervous, we may not say what we mean to say the first time – give the participant the option of revising his or her words.
- **Relevance:** We all learn best when we feel the subject is relevant to us. Find ways of making connections between the topic you are presenting and your managers' lives. For example, you may want to remind participants that we all have days or periods in our lives where we feel distressed, pressured or are going through something difficult. This may be helpful for them when they are thinking about working with an employee who is distressed, as they can think about how they might be in that employee's shoes at some time in their life.
- **Opportunities to succeed:** When designing and implementing your group activities and asking questions, try to include all participants in the group. Ensure each participant has the opportunity to practice a concept, add to the discussion or get an activity right. Be sure to give reinforcement for a job well done. If a participant struggles with an activity, point out any positive aspect that was displayed in his or her effort, and then try providing a suggestion.

- **Simple language:** You may have a grasp of language related to workplace mental health issues, but for participants who may not have had any exposure to these concepts, this language can sound like jargon and create barriers to understanding. Avoid using technical terms and, when you can't avoid them, make sure you define them in a way that others can clearly understand.
- **Avoid unrealistic expectations:** All organizations must meet certain business objectives to remain viable. So when working on strategies that may have a positive effect on mental health, we must also take into account how those strategies impact the viability of the organization. Do they support employees doing good work or impede them?

By setting the parameters up front in terms of the resources and time available for the strategies you are developing, you help manage expectations. Many of the evidence-based strategies recommended in MMHM cost little more than the time to agree to adopt them. They involve a commitment to interacting in a healthier way or to adjusting a process slightly.

When faced with a request for something that is not possible due to cost or time, you might say, "What is the ultimate objective of this idea?" and when that is established ask, "How could we do this within our budget or time constraints?". Often if we can determine the underlying need or objective, we can brainstorm alternative strategies.

- **Address negativity or cynicism:** If your organization has had challenges in the past with implementing programs like MMHM, it may be that your managers have a hard time believing that involvement in this process will result in a significant or lasting improvement. If this is the case, you may want to acknowledge this feeling up front and ask for agreement that, in spite of what has gone before, your group wants something different for their work experience. If you can accept responsibility for what has not been perfect in the past (even if its success was out of your control) and sincerely state your desire to change things in the future, this may help to get participants on board with MMHM. If a participant presents a negative statement, you may want to ask, "How could we do that differently?", "What would you think might work better?", "How can we do this in a healthier way?".
- **Know your audience:** This can be as simple as creating a list of names and setting up a seating plan so that you can address each participant by name. Even better, find out from participants before your presentation how they learn best, their likes and dislikes, and any particular challenges they face. It's also important to introduce yourself if not all participants know you – write your name on the whiteboard or somewhere equally visible. If you do not know participants in your group, you may want to complete an ice-breaker activity. Ice-breaker activities can be found online at adult education websites.
- **Show your interest in the topic and engage their interest:** Your participants will know if you're interested, or whether you are just going through the motions. If you state up front that participants will be evaluated on how they are able to apply what they learn, they are more likely to be engaged. Where possible, follow through on this and set up a time to evaluate participants by email, performance management processes, a survey or other method.
- **Stay focused:** You're not going to cover the entire issue of workplace mental health in your presentation. In fact, you shouldn't even try. Focus on only the module at hand. The point of implementing MMHM is to do just that – manage mental health matters in your workplace more effectively, and that includes the mental health of your participants!
- **Keep an eye on the clock:** Participants need a break at least every 90 minutes. Be ready to shorten something in your presentation if the session takes longer than you planned. Conversely, everything could go so smoothly that you have extra time on the clock. Have something in your back pocket that you can use to extend their learning – and the time – if it's needed.

What if I can't answer participants' questions?

Relax! It's okay! Admitting you don't know something and discussing how you might go about finding the answer can be an important learning opportunity for participants. And, if you promise to find the answer and get back to them, make sure you do! Even if you can't find the answer, passing a question on to someone who might know the answer is a positive step. Let the participants know if you have or have not found the information they wanted, and if you don't have the information, that you have passed the request on and how they can follow up. An alternative approach is to ask a participant to research the information and ask him or her to discuss it when you next meet.

What if I make a mistake?

One innovative organization actually holds monthly mistake meetings. The meeting begins with the leader talking about the biggest mistakes he or she has made in the past month, and what he or she did, or is doing, to resolve the problems. If you have established trust among participants, you can then encourage each of them to take his or her turn discussing an error and the actions taken to correct it. The rationale behind this process is that when a leader is assumed to never make a mistake, staff are more likely to try to conceal their mistakes. This can lead to undetected problems and issues that can intensify. By discussing mistakes as a part of everyone's experience, you also share solutions and strategies to overcome challenges on a regular basis. So, if you make a mistake, use it as an opportunity to engage participants in a conversation about the many ways we can fix our mistakes.

So, if you are ready to begin, choose the specific MMHM episode you would like to discuss. When you feel comfortable with the material, call participants together and let them know that mental health does matter in your organization. Remember that the process of bringing participants together can be a first step to a mentally healthy workplace. The next step is engaging them in developing skills and solutions that are cost-effective and result in improved productivity. The process can be as important as the outcome!

Supporting Exercises

Feedback given during the one-on-one or group discussions should be respectful and positive. A respectful and positive framework encourages people to share thoughts and ask questions about what can be emotional or contentious issues.

Real life scenarios from your workplace may be used to discuss the potential application of the learning in your unique work environment, but be sure to protect the privacy of individual employees by refraining from disclosing names or other identifying information.

In order to support each participant's skill development and increase managers' comfort levels in applying their learning, some suggested exercises are provided for each episode.

Online Resources

This guide refers to supplementary resources that can help further expand the understanding of participants.

All resources mentioned are available free of charge from the Great-West Life Centre for Mental Health in the Workplace website at www.workplacestrategiesformentalhealth.com.

MANAGING MENTAL HEALTH MATTERS

EMAIL NOTICES

You can subscribe online for a free series of email templates to help you put MMHM on the calendars of your management team, and highlight the importance your organization places on management education and awareness of workplace mental health issues.

- Background information about each of the MMHM modules:
 - *Managing Accommodation*
 - *Managing Performance*
 - *Managing Conflict*
 - *Managing Return to Work*
 - *Managing Emotions*
- Test Your Knowledge
- A script to help you introduce the topic to your management team
- Guidelines for completing each module
- A framework for setting a time to come back together for a discussion about what participants learned and how to apply it in your organization.

The following Introduction email is an example of what you can expect. This email can be used for the Introduction and Pre-Evaluation.

Subject: Managing Mental Health Matters

[You have subscribed to receive the online series of Leader email templates for Managing Mental Health Matters (MMHM). Suggested content for the first email that you could send to your management team is below. Whether you use these email templates or create your own, this email service will provide a reminder to move on to the next episode. Refer to the MMHM Leader's Guide for more information. PLEASE REMEMBER TO REMOVE THIS GREY TEXT BEFORE SENDING TO YOUR MANAGEMENT TEAM.]

Hello,

I am committed to helping fulfill our responsibility to contribute to a psychologically healthy and safe workplace. Part of our approach will focus on education and awareness of managing workplace mental health issues.

Approximately every 12 weeks I will send you a new link to one episode of MMHM. This video-and story-based program focuses on helping us learn to more effectively recognize and manage mental health-related issues in the workplace, such as return to work, accommodation, performance management, conflict resolution and our own responses to each of these situations.

This week, I'd like to get things started by asking you to do a pre-evaluation. It will help us measure how comfortable we are today with managing mental health issues in the workplace. I encourage you to answer the questions as honestly as possible. This will help to establish a starting point for measurement. We'll also do a post-evaluation once we've completed the five episodes in the MMHM program to see how we did. Please send a copy of the completed pre-evaluation to me by [DATE] and keep a copy for your records.

There's no need to do anything else right now. Watch for my email in the coming days that will have the subject line: Managing Mental Health Matters: Introduction.

[YOUR EMAIL SIGNATURE]

Whether you use these email templates or create your own, you can use the email service as a reminder to move on to the next module. This service can be accessed at www.workplacestrategiesformentalhealth.com/immhm.

MANAGING MENTAL HEALTH MATTERS

EPISODE 1: MANAGING EMOTIONS

Dealing with distressed employees can be one of the greatest challenges any manager faces. A manager's role can feel particularly demanding when, in addition to the full range of regular tasks, they are faced with the responsibilities of dealing with workers who exhibit what may at times be intense emotion states or demanding mental health issues. Unfortunately, the workplace often provides limited or no training in these areas.

The messages in this episode include:

- How to respond more effectively to workers who are distressed or, at minimum, avoiding reactions that make a situation worse.
- Understanding common barriers to responding effectively to emotionally distressed workers (e.g., uncertainty about what to say or do, lack of clarity about appropriate role, lack of organizational support).
- The value of engaging in assertive, non-defensive communication that avoids aggressive, passive or passive-aggressive behaviours.
- Ways to provide and receive negative feedback in a constructive and respectful manner.
- Ways to negotiate and resolve emotionally charged disagreements between and with workers.
- Understanding how to more effectively manage the emotional dynamics of a team or group.
- Understanding how what managers say and do may affect workers' reactions, and how workers' reactions may impact managers.
- The importance of effectively understanding, anticipating and managing personal and work-related stressors.
- Ways to self-regulate and calm oneself, effectively express anger, and demonstrate self-discipline and impulse control in ambiguous or stressful situations.

Questions for considering existing policies and processes:

(Be prepared with the actual policies, procedures or resources that your organization currently offers and/or ask a knowledgeable representative from your human resources area to co-facilitate this with you.)

- 1. What will be our process to assess and improve emotional intelligence in managers?*
- 2. What is the expectation or threshold for emotional intelligence?*
- 3. What are the consequences when we do not demonstrate adequate emotional intelligence?*
- 4. How will we measure the outcomes related to emotional intelligence and how will this impact performance reviews?*
- 5. How do we cope at times of emotional distress or pressure?*
- 6. What help is available in our organization for managers?*

Once you have considered the answers to these questions, you can bring together your supervisors and managers for a discussion by sending them an email such as:

Subject: Managing Mental Health Matters – Episode 1: Managing Emotions

Consider your thoughts or ideas for each of the following questions and come to the session prepared to discuss:

1. What should be our process to develop emotional intelligence in managers?
2. What should be the expectation or threshold for emotional intelligence?
3. How should we measure the outcomes related to emotional intelligence and how should this impact performance reviews?
4. How do you cope at times of emotional distress or pressure?

Suggested Exercises for Managing Emotions

Following are exercises designed to help participants explore the concepts in this episode.

1. Annual Skills Assessment

Make a commitment to have a yearly plan to assess and improve emotional intelligence at work. Have your staff complete the Skills Assessment to identify unique strengths and areas for improvement. Have them select a particular skill that already represents an area of strength, choose a particular skill that is flagged as one in which he or she would benefit most from further improvement, or pick a particular skill area that is specifically relevant to a workplace issue they are facing currently.

2. Biggest Dos and Don'ts*

Have participants divide into two groups. Ask one group to write a list of Dos related to managing emotions as taught in MMHM and the other group to write a list of Don'ts. Have each group present their list to the other and invite discussion. Have participants decide on the most important (or biggest) Dos and Don'ts with respect to dealing with workers' emotional reactions.

3. Dealing with Workers' Emotional Reactions

Assign participants a writing assignment to report back on how they used what they learned in *Managing Emotions* with their direct reports. Discuss with the participants any instances in their workplace where they have seen negative emotions in the workplace, how they approached the worker's reaction, whether or not the worker's distress was reduced, and whether or not (based on the information they learned in the episode) they now have other options for how to approach workers who are emotionally distressed.

4. I Discovered...*

Ask participants to finish these sentences based on what they learned in this episode:

- I discovered...
- I re-learned...
- I was surprised to learn...
- I forgot that...
- I noticed that...
- I plan to...
- I will tell colleagues about...

Have participants share their answers with each other and discuss the significance of what they discovered.

* *Ideas in these exercises are adapted with permission from 425 Seriously Fun Ways to Enhance Learning And Make It Stick!, 2009 by Christie Sterns www.trainingmakescents.com*

5. All Together Now...

Review the online quizzes (see questions and answers below for your convenience) together as a team and discuss people's responses.

While the resource strives to provide effective responses, your team may decide that an alternate approach is best for your unique situation.

If you record the final strategies agreed between you and the team, they can form a basis for procedures going forward.

Episode 1: Managing Emotions Quiz

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

If the participant answers:	Provide this 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 to them 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 in this way.

If the participant answers:	Provide this rationale:
c) She should have told Allan how upset she was by the news.	Correct. Although she is the manager and team leader, it is understandable (not to mention unavoidable) for Rebecca to have an emotional reaction to the bad news about the project. As long as she communicates about 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:

If the participant answers:	Provide this rationale:
a) Should have spoken with Allan about how to communicate the news to her team.	Correct. 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 from a situation can provide guidance that is freer from the 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 what the news might be. Furthermore, with an unresolved stressful situation on her mind, Rebecca probably wouldn't have been able to relax and sleep 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 single out 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:

If the participant answers:	Provide this 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.
b) Should have apologized for the overly positive messages she gave her team previously.	Correct. Rebecca appears to have misinterpreted the strength of the project in terms of budget, and her confidence led her to give positive feedback that turned out in part to be 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 the necessary parameters, including budget. It would be disrespectful to 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 project.

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

If the participant answers:	Provide this 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.

If the participant answers:	Provide this rationale:
<p>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.</p>	<p>Correct. 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.</p>
<p>c) Ended the meeting sooner, as soon as she noticed emotions escalating.</p>	<p>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.</p>

This is to certify that

has successfully completed

EPIISODE 1
MANAGING EMOTIONS



Date

Authorized Signature

MANAGING MENTAL HEALTH MATTERS

EPISODE 2: MANAGING ACCOMMODATION

It is important for managers to be aware of what may be necessary or prudent when providing workplace accommodations. There is no need to become an expert in mental health as the focus is on workplace issues and not healthcare. There is a legal duty to offer reasonable accommodation for an employee experiencing 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 employers to be as effective as possible with all employees.

When developing or implementing accommodations with employees, managers can benefit from adopting certain techniques regarding approach, attitude and language.

Managers will need to communicate from time to time with employees who may be emotionally distressed. Developing the skills in this episode can be helpful in many different situations. The messages in this episode include:

- Stay calm and focused on the workplace situation rather than on the personal characteristics of the employee.
- Respect the employee's right to privacy as well as their right to disclose and discuss their mental illness at work.
- Know the difference between appropriate and inappropriate questions when speaking with an employee about mental health issues in the workplace.
- Be aware of the various possible accommodation strategies for people experiencing a mental health issue in the workplace.
- Engage the employee in developing the accommodation plan to allow for his or her commitment to its success.

Questions for considering existing policies and process:

(Be prepared with the actual policies, procedures or resources that your organization currently offers and/or ask a knowledgeable representative from your human resources area to co-facilitate this with you.)

1. *How will we approach an individual when we think an accommodation may be needed?*
2. *What is our process to develop an accommodation plan?*
3. *Who needs to be involved from our organization?*
4. *With whom can we share personal information about an employee?*
5. *What are the limits of our authority in terms of accommodation strategies?*
6. *What is the expectation for us in terms of monitoring an ongoing accommodation plan?*
7. *How do we respond to an employee in crisis?*
8. *What are the resources available in our organization to assist with an accommodation?*
9. *What policies does our organization have related to accommodation?*

Once you have considered the answers to these questions, you can bring together your supervisors and managers for a discussion by sending them an email such as:

Subject: Managing Mental Health Matters – Episode 2: Managing Accommodation

Consider your thoughts or ideas for each of the following questions and come to the session prepared to discuss:

1. How will you approach an individual when you think a mental health-related accommodation may be needed?
2. What will be your process to develop an accommodation plan for your employee and who is involved from our organization?
3. With whom can you share personal information about an employee?
4. How will you monitor an ongoing accommodation plan?
5. How will you respond to an employee in crisis?
6. How will you measure the success of an accommodation?

Suggested Exercises for Managing Accommodation

Following are exercises designed to help participants explore the concepts in this episode.

1. Say What?

Put participants in pairs. (If only one participant, ask him or her to present each of the topics in three sentences or less to evaluate if he or she is able to grasp the essence of the concepts.)

Assign, or have each pair select, one topic. Their task is to take 10 minutes to discuss and record:

- How the concept may be challenging to implement in their workplace
- Possible benefits of implementing this concept

Let each pair know that they should be prepared to share their findings with the larger group.

Assign a topic from the following list without providing additional information:

- a) Listening for understanding
- b) Distinguishing validation from agreement
- c) Communicating without judgment
- d) Implementing needs-based problem solving

What follows are short explanations for the Leader to compare with the information presented by participants. Allow participants to return to the MMHM website if they feel the need to review the information to develop their presentation. Alternatively, you can ask participants to come prepared with knowledge of all four topics and create the presentation from their notes.

a) Listening for understanding

Listening for understanding takes place when you are sincerely trying to understand not just what a person says, but what they mean. When someone is distressed or dealing with a mental health issue, it is not unusual for them to say things that are not really reflective of what they truly mean. Giving someone the safety and the space to articulate and then clarify or correct what they say means you have a much better chance of understanding their perspective. Sometimes the content of what we hear will elicit an emotional response in us. As we listen to others, we may be distracted by our own internal chatter that can include judgments, opinions, and reactions to what is being said. When we listen for understanding, we focus on the individual and their agenda, not our own. We listen for underlying issues and needs so that we are better prepared to begin a discussion about solutions.

b) Distinguishing validation from agreement

Because each person has different needs and views there will always be some conflict in living and working with others. Effective listening can help us better problem-solve and generate solutions that meet more of everyone's needs. Listen first and acknowledge what you hear, even if you don't agree with it, before expressing your point of view.

To acknowledge that someone else's feelings are valid for them, even when we do not feel the same way, can allow our communication partner to feel heard and therefore better able to listen. Acknowledging another person's thoughts and feelings still leaves you with all the following options:

- Agreeing or disagreeing with the person's point of view or actions (but not with their feelings).
- Confirming that you are unable to grant a particular request, but are willing to explore other ways to meet the same need.
- Exploring the matter further.

c) Communicating without judgment

When we are listening to what people are saying, we may have an emotional response and make judgments or assumptions about the intent and meaning of the message. These judgments can lead us to respond in a way that fuels mistrust and conflict. To avoid a potential impasse in difficult conversations, we can:

- Turn down our internal dialogue and stay focused on what is being said.
- Breathe and neutralize our emotions.
- Listen and acknowledge alternate perspectives.
- Move from judgment to curiosity by asking questions to gain better understanding.
- State observations and experience using specific examples.
- State perspective, needs and desires.
- Reframe the problem into a mutual, objective statement.

d) Implementing needs-based problem solving

All emotions, thoughts and behaviours stem from needs. Problems and conflicts in the workplace (and elsewhere) can result from needs that are not satisfied.

- The first step is to identify the needs of all parties.
- The second step is to creatively collaborate on possible strategies to ensure that the most important needs of all parties are met in a mutually agreeable way.
- The third step is to affirm the agreement, address any misunderstandings and discuss a process for handling the problems in the future, if necessary.
- The final step is to document the agreement, providing all parties with a copy.

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

2. Here's the Answer. What's the Question? *

Put participants in pairs or triads, and provide each group with paper or index cards to record questions. Ask participants to discuss the *Managing Accommodation* episode, and prepare three or four questions and answers that can be used to test their colleagues.

Advise each team that the questions and answers they develop should include all concepts they feel are most relevant to their work. You can then assess if they have identified the concepts you feel are most important.

Provide opportunities for each participant to state the answer and have other participants try to guess the right question. Allow for discussion where the question is not guessed correctly before moving on to the next one.

(If you have just one participant, have him or her prepare a series of questions and answers that cover what he or she feels are important concepts for his or her work. Take the information to assess if he or she has identified the concepts you feel are important, and then a day or more later ask him or her what the question is to the answers he or she wrote down.)

3. All Together Now...

Review the online quizzes (see questions and answers below for your convenience) together as a team and discuss people's responses. While the resource strives to provide effective responses, your team may decide that an alternative approach is best for your unique situation. You can explain that all of the answers provided in MMHM are reasonable for a good manager, but the preferred answers demonstrate an advanced understanding of mental health at work. If you record the final agreed best answers for you and your team, they can form a basis for a list of procedures going forward.

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Episode 2: Managing Accommodation Quiz

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

If the participant answers:	Provide this rationale:
a) He did not seek to understand the cause of Mark's distress.	Correct. Mark said he did not want to talk about it, so there was really no way for John to understand his distress.
b) The co-workers may resent having to cover for Mark.	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.

If the participant answers:	Provide this rationale:
True	Not necessarily 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. Provide same rationale as above.

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

If the participant answers:	Provide this rationale:
a) Until the employee is feeling well again.	Not necessarily. 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.

If the participant answers:	Provide this rationale:
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:

If the participant answers:	Provide this 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 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 to 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.

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EPIISODE 2
MANAGING ACCOMMODATION



Date

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MANAGING MENTAL HEALTH MATTERS

EPISODE 3: MANAGING PERFORMANCE

Addressing performance issues with an employee can be uncomfortable and even stressful for some managers 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 the skills taught in these episodes 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 them to maintain their sense of value and competence. If done correctly, supporting an employee to remain a contributing member of the team can be a better, healthier approach than simply taking away tasks. Feeling valued goes a long way in maintaining and protecting mental health at work.

Because of possible fluctuations in mood and in the ability to process job-specific duties that may accompany poor mental health, employees with mental health issues may display performance difficulties at work. When employees fear losing their job, status or respect at work due to the stigma and lack of understanding about mental health issues, they may resist asking for help. Moreover, sometimes the illness itself prevents people from recognizing that this is a health concern and not simply a set of unfortunate circumstances in their life leading to despair or worry. For this reason, concerns about performance in the workplace that are related to a mental health issue are typically first brought up by the manager or pointed out by a co-worker.

The key messages from this episode include:

- Managers can learn how to recognize when performance issues may be resulting from mental health issues.
- There are suggested approaches for dealing with an emotionally distressed employee.
- There are communication strategies that can assist in effectively identifying barriers to success at work and strategies to overcome them.
- A supportive, rather than punitive, approach to performance management may be preferable.
- Managers can proactively and collaboratively develop strategies with employees to deal with any future concerns, should they arise.

Questions for considering existing policies and processes:

(Be prepared with the actual policies, procedures or resources that your organization currently offers and/or ask a knowledgeable representative from your human resources area to co-facilitate this with you.)

1. *What will be our process when performance issues arise?*
2. *What is our standard performance management process and how does this differ?*
3. *Who needs to be involved from our organization?*
4. *How do we consider mental health issues before beginning discipline?*
5. *When is discipline necessary and what is the process?*
6. *What are the limits of our authority in terms of discipline?*
7. *What is expected of us in terms of ongoing performance management?*
8. *What are the resources available in our organization to assist with performance management?*
9. *What policies does our organization have related to performance management?*

Once you have considered the answers to these questions, you can bring together your supervisors and managers for a discussion by sending them an email such as:

Subject: Managing Mental Health Matters – Episode 3: Managing Performance

Consider your thoughts or ideas for each of the following questions and come to the session prepared to discuss:

1. What will be your process when performance issues arise?
2. How will you consider mental health issues before beginning discipline?
3. When would you feel discipline is necessary and how would you proceed?
4. What resources or information do you access to assist you with performance management?
5. How should we measure effective management of performance issues?

Suggested Exercises for Managing Performance

1. Management Strategies

Assign topics from the Leadership/Management section of the Great-West Life Centre for Mental Health in the Workplace website www.workplacestrategiesformentalhealth.com and have participants present a condensed version of the material on each topic, with at least one example of how to use the information or strategy in your workplace.

2. Biggest Dos and Don'ts*

Have participants divide into two groups. Ask one group to write a list of Dos related to performance management as taught in MMHM and the other group to write a list of Don'ts. Have each group present their list to the other and invite discussion. Have participants decide on the most important Dos and Don'ts for your workplace performance management process.

3. All Together Now...

Review the online quizzes (see questions and answers below) together as a team and discuss people's responses. While the resource strives to provide effective responses, your team may decide that an alternative approach is best for your unique situation. You can explain that all of the answers provided in MMHM are reasonable for a good manager, but the preferred answers demonstrate an advanced understanding of mental health at work. If you record the final agreed best answers for you and your team, they can form a basis for a list of procedures going forward.

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Episode 3: Managing Performance Quiz

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

If the participant answers:	Provide this rationale:
a) Is normally too burdensome for the employee who is just coming back.	If an employee is well enough to return to work, they should be well enough to participate in discussions about what will impact the success and sustainability of their return.

If the participant answers:	Provide this rationale:
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 they feel they 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:

If the participant answers:	Provide this 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 later.	Understanding how best to provide direction and feedback should help you to address future issues more effectively.

3. Focusing performance management on solutions rather than problems:

If the participant answers:	Provide this 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 <i>is</i> 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.	Correct. If handled well, this approach has the potential to focus everyone's attention on how to create a positive way forward.

4. George's poor performance:

If the participant answers:	Provide this 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 behaviour begins to negatively affect co-workers. This is one reason that early intervention can be best for all concerned.

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has successfully completed

EPIISODE 3
MANAGING PERFORMANCE



Date

Authorized Signature

MANAGING MENTAL HEALTH MATTERS

EPISODE 4: MANAGING CONFLICT

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 your participants learn more about this, encourage them to watch *Working Through It* at www.workplacestrategiesformentalhealth.com/wti. You could request a DVD from the Great-West Life Centre for Mental Health in the Workplace so that you could view all 1.5 hours together as a team, or they can simply go online and watch them as five-minute video segments when time allows. Afterward, you could have a discussion about what they learned, what surprised them and what they will do differently as a result of seeing this resource. You may also want to encourage them to share this with their employees.

Given the personal and interpersonal challenges that can accompany poor mental health, learning to facilitate and mediate the resolution of conflict between co-workers in the workplace is an important skill for managers to learn.

The key messages in this episode include:

- Address issues of conflict in the workplace in a timely manner to help prevent a worsening of the situation.
- Solicit possible solutions from those involved in the problem. It can be more effective than offering a solution to them.
- Keep employees focused on solutions and generating viable options to help avoid the trap of going over and over the same problems and complaints.
- Secure agreement and commitment from employees involved in conflict to increase the likelihood that they will follow through.

Questions for considering existing policies and processes:

(Be prepared with the actual policies, procedures or resources that your organization currently offers and/or ask a knowledgeable representative from your human resources area to co-facilitate this with you.)

1. *What will be our process when conflict arises?*
2. *What is our standard conflict resolution process now and how does this differ?*
3. *Who needs to be involved from our organization?*
4. *How do we consider whether conflict may be related to mental health issues?*
5. *When is discipline necessary and what is the process?*
6. *What are the limits of our authority in terms of discipline?*
7. *What is expected of us in terms of an ongoing awareness and resolution of conflict?*
8. *What are the resources available in our organization to assist with conflict resolution?*
9. *What policies does our organization have related to conflict resolution?*

Once you have considered the answers to these questions, you can bring together your supervisors and managers for a discussion by sending them an email such as:

Subject: Managing Mental Health Matters – Episode 4: Managing Conflict

Consider your thoughts or ideas for each of the following questions and come to the session prepared to discuss:

1. What will be your process when conflict arises?
2. How will you consider whether conflict may be related to mental health issues and will this change your approach?
3. Under what circumstances would you feel discipline is necessary and what would be your process?
4. What resources or information do you access to assist with conflict resolution?
5. How should we measure effective conflict resolution?

Suggested Exercises for Managing Conflict

1. Handling Co-worker Reactions

Discuss with the participants any instances in their workplace where they have seen these kinds of reactions, how or whether or not the problem was solved, and whether or not (based on the information they learned in the episode) they now have other options for attempting to solve the conflict.

Supplement the learning from this episode with the information found on the Great-West Life Centre for Mental Health in the Workplace website www.workplacestrategiesformentalhealth.com under the Intervention and Accommodation sub-section Co-Worker Reactions.

2. Top 10*

Have participants create a top 10 list of what they learned from this episode. Have them share these with the others in the group. *(If you only have one participant let them share his or her top 10 with you.)*

3. All Together Now...

Review the online quizzes (see questions and answers below for your convenience) together as a team and discuss people's responses. While the resource strives to provide effective responses, your team may decide that an alternative approach is best for your unique situation. You can explain that all of the answers provided in MMHM are reasonable for a good manager, but the preferred answers demonstrate an advanced understanding of mental health at work. If you record the final agreed best answers for you and your team, they can form a basis for a list of procedures going forward.

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Episode 4: Managing Conflict Quiz

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

If the participant answers:	Provide this 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 the 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:

If the participant answers:	Provide this 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 they 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.
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:

If the participant answers:	Provide this rationale:
a) By those still at work with an agreement to give the employee a fresh start.	Although getting the 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 all over again. Helping everyone to find a new way to interact is more effective in the long run.
b) Unless the returning employee is fragile.	This may be more important for employees who may be 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 move 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 Sam's needs are for successful return to work, John should:

If the participant answers:	Provide this rationale:
a) Inform Ann about the plan and tell her what her role will be.	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 behaviours towards Sam 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.

This is to certify that

has successfully completed

EPISODE 4
MANAGING CONFLICT



Date

Authorized Signature

MANAGING MENTAL HEALTH MATTERS

EPISODE 5: MANAGING RETURN TO WORK

Effectively supporting an employee's return to work following a period of disability is an important function of a management role. When an employee is returning to work after a long or short-term disability, they can feel nervous, vulnerable or full of self-doubt about their role at work, their ability to perform their role effectively and how their 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 their 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.

The key messages in this episode include:

- Accommodating mental health disabilities can be challenging, and understanding the possibilities and limitations can make it easier.
- Effective return-to-work strategies must include how a supervisor and employee will interact effectively.
- The employee's accommodation plan should include strategies to cope with or reduce workplace stressors or triggers that affect their mental health.
- Engage and empower the returning employee to develop a plan for their own success.
- Manage co-worker reactions, including curiosity, fear, frustration or hostility to influence the success of a return to work.

Questions for considering existing policies and processes:

(Be prepared with the actual policies, procedures or resources that your organization currently offers and/or ask a knowledgeable representative from your human resources area to co-facilitate this with you.)

1. *What will be our process while someone is off work due to mental health issues?*
2. *What policies does our organization have related to return to work?*
3. *What is our standard return-to-work process and how does this approach differ?*
4. *Who needs to be involved from our organization?*
5. *When do we begin discussion about return to work and what is the process?*
6. *What are the limits of our authority in terms of return-to-work planning?*
7. *What is expected of us in terms of ongoing management of return-to-work success?*
8. *What is the process if the return to work is not going well?*
9. *What are the resources available in our organization to assist with the return to work?*

Once you have considered the answers to these questions, you can bring together your supervisors and managers for a discussion by sending them an email such as:

Subject: Managing Mental Health Matters – Episode 5: Managing Return to Work

Consider your thoughts or ideas for each of the following questions and come to the session prepared to discuss:

1. What will be your process while someone is off work due to mental health issues?
2. When will you begin discussion about return to work and what will be your process?
3. Who from the organization will be involved in the return to work process?
4. What is your process if the return to work is not going well?
5. What resources will you access to assist with the return to work?
6. How will we measure effective and sustainable return to work strategies?

Suggested Exercises for Managing Return to Work

1. I Discovered...*

Ask participants to finish these sentences based on what they learned in this episode:

I discovered...

I re-learned...

I was surprised to learn...

I forgot that...

I noticed that...

I plan to...

I will tell colleagues about...

Have participants share their answers with each other and discuss the significance of what they discovered.

2. What's Missing?

Have your participants review the Return to Work section of the Great-West Life Centre for Mental Health in the Workplace website and identify the information that was NOT discussed in the MMHM episode.

Have each participant choose two items of information and present on it to the group. Provide a list of items for the facilitator's reference.

3. All Together Now...

Review the online quizzes (see questions and answers below for your convenience) together as a team and discuss people's responses. While the resource strives to provide effective responses, your team may decide that an alternative approach is best for your unique situation. If you record the final strategies agreed between you and the team, they can form a basis for procedure going forward.

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Episode 5: Managing Return To Work Quiz

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

If the participant answers:	Provide this 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 Sam, it may be criticism, but for others a stressor may be isolation or too much noise. Understanding their 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 Sam to reduce her stressors:

If the participant answers:	Provide this 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, their 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. Sam's co-workers, including Ann:

If the participant answers:	Provide this rationale:
a) Will welcome Sam 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.

If the participant answers:	Provide this rationale:
b) Should be happy to help Sam out with her work while she is getting back up to speed.	Often co-workers are busy enough and do not feel great about taking on 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 Sam's return to work.	Correct. 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.

MANAGING MENTAL HEALTH MATTERS

FINAL EVALUATION – QUESTIONS AND ANSWERS

The following questions are either multiple choice or true and false questions. For each question, please circle the most appropriate response based on the training that you just completed.

1. The duty to accommodate employees:

If the participant answers:	Provide this rationale:
a) Is required by law for both physical and mental disabilities.	Correct. This is true AND it can make good business sense when you can accommodate to retain talented and trained employees.
b) Is the responsibility of the employer.	While it is true that the employer has a duty to accommodate, this responsibility is also shared with the union, if any, and with the employee themselves.
c) Means that co-workers must take on the burden of extra work.	Although this is sometimes true, especially during a graduated return to work, creating an accommodation that minimizes the negative impact on co-workers is also one that can minimize the negative response to the employee.

2. How and what personal information may be shared with co-workers?

If the participant answers:	Provide this rationale:
a) This is up to the individual employee with the disability.	Correct. When an employee wishes to share personal information, including information about his or her health or medical information, they are free to do so. Remember that talking about physical health issues is common, and those who wish to talk about their mental health issues should not be treated differently.

If the participant answers:	Provide this rationale:
b) Through the manager only, but with permission from the disabled employee.	The employee may request that the manager share some of their personal information with employees, to help them understand what is going on. Where possible, it may be preferable to have the employee write out or email exactly what they want shared.
c) The medical diagnosis should only be shared when the employee presents a risk to others.	Although the employer must manage risks to other employees, this does not necessarily mean disclosing a diagnosis. Expert advice should be sought in these situations.

3. A trained physician should determine how best to accommodate an employee with a mental health-related disability.

If the participant answers:	Provide this rationale:
a) True.	It is rare for a physician to be sufficiently informed about the job or the workplace realities to do this effectively. The physician's role and expertise is to provide a prognosis (how long it is expected the disability will continue) and the functional limitations that could affect the employee's ability to work. The employer's role is to work collaboratively with the employee (and the union if relevant) to create a workplace plan.
b) False.	Correct. It is rare for a physician to be sufficiently informed about the job or the workplace realities to do this effectively. The physician's role and expertise is to provide a prognosis (how long it is expected the disability will continue) and the functional limitations that could affect the employee's ability to work. The employer's role is to work collaboratively with the employee (and the union if relevant) to create a workplace plan.

4. Co-workers who express fear of an employee with a mental health disability should:

If the participant answers:	Provide this rationale:
a) Be heard, and a process to reduce their fears should be considered.	Correct. Even if the fears are based on half-truths or misconceptions, it is important to recognize that they are real to those who have them and have the potential to cause mental and/or physical health problems. Helping employees feel safe at work should be part of good management.

If the participant answers:	Provide this rationale:
b) Be told you cannot talk about it due to confidentiality requirements.	Co-worker fears and anxieties are as important as the fears and anxieties of the ill employee. This does not include disclosing personal information, but does mean helping co-workers to feel confident that their work situation is not dangerous. Where it is true, assure them that management would not knowingly put anyone in harm's way and are handling the situation.
c) Be given mental illness awareness training.	While mental illness/mental health awareness should be part of an overall approach to workplace health promotion, this type of training should not appear to be about a single employee.

5. Managing for high performance:

If the participant answers:	Provide this rationale:
a) Can be good for workplace mental health.	Correct. This can be true when employees are supported to reach their unique potential in a way that promotes their strengths and success at work.
b) Should be avoided or toned down for employees with mental illness.	This is not necessarily true as some employees will thrive on some level of challenge, even with mental illness.
c) Means applying consistent standards for all employees.	The law concerning accommodation suggests that equity can require applying standards differently to accommodate those with disabilities.

6. Where emotional distress may be an issue, performance management should begin with:

If the participant answers:	Provide this rationale:
a) Clear direction from management about how an employee is to meet their objectives.	Where possible, management should provide clear direction about what the objectives are and involve the employee in developing how they will meet the objectives. This allows the employee to consider what may be needed to be successful at carrying out their assigned tasks and is more likely to result in employee engagement.
b) Communication of the manager's desire to support the employee's success at work.	Correct. This can set up the foundation for a more open discussion.
c) A self-assessment by the employee of their strengths and weaknesses.	While this may be an important component, until there is trust in management, it is unlikely that an employee would feel safe in providing an honest assessment. Beginning with the establishment of management's intention to support success may be a better beginning.

7. Conflict resolution:

If the participant answers:	Provide this rationale:
a) Should consider how to maintain the dignity of each stakeholder while focusing on the solution that allows all parties to move beyond the source of conflict.	Correct. When one or more people are left feeling they “lost” the conflict, it may leave feelings of resentment or hostility. By helping everyone to feel part of a new solution, it is more likely that the resolution will be sustainable.
b) Should first and foremost meet the needs and objectives of the organization.	Although meeting the needs and objectives of the organization is important, if the needs of the individuals are not given equal weight, the resolution is less likely to be sustainable.
c) Should always be conducted by a professional third party in a formal manner.	Many minor conflicts are resolved in an informal manner. It is when this approach does not work that more formal methods should be considered.

8. It is important to establish all of the facts of the conflict before coming to a resolution.

If the participant answers:	Provide this rationale:
a) True.	In most (non-legal) situations, dredging up every detail can force parties to justify and defend their positions. This can create a larger barrier to resolution. By focusing on what people need to move forward, instead of the past, we can often reach better solutions.
b) False.	Correct. (repeat rationale)

9. Resolving conflict between employees, a manager:

If the participant answers:	Provide this rationale:
a) Must take on the leadership role.	Although the manager has accountability for the welfare of the workplace, when resolving conflict his or her main role is of a facilitator to help the parties commit to a resolution.
b) Is best advised to deal with each employee separately throughout the process.	Traditional conflict resolution includes active participation of both parties, but when one party may have a mental health issue, you may want to begin with separate conversations to promote a safe environment to discuss possible solutions.
c) Should explain the importance of resolving the conflict in a safe and respectful manner that can result in mutually agreed decisions that allow all parties to move forward.	Correct. It should be clear from the start that resolution is required and that each party must agree to work towards this end.

10. Asking an employee what he or she needs in a return-to-work plan is giving over too much control to the employee.

If the participant answers:	Provide this rationale:
a) True.	While all decisions for a return to work must focus on how to help an employee do the job at hand, allowing an employee to state what they need to get the job done helps them to commit to a solution that can work for them. This does not mean saying yes to every request, but understanding the underlying need and helping develop a solution.
b) False.	Correct.

11. Stress is a subjective matter. What may be stress-neutral for one individual may be the source of significant anxiety for another. Therefore:

If the participant answers:	Provide this rationale:
a) It is best to have the doctor specify which tasks at work are considered to be stressful.	The doctor rarely understands all of the stressors at work. While they may be able to share general stress triggers, a conversation between the supervisor and employee can clarify what really needs to be addressed.
b) Asking the manager to just provide a less stressful work environment can be unfair.	Correct. If the manager does not specifically understand what the stressors are for the employee, he or she may feel stressed by trying to guess what this means. By asking the employee to be specific, the manager has clearer guidelines.
c) If the employee says his or her boss is the source of stress, you should move the employee to another department.	If the source of stress is the manager and you move the employee, the manager may continue this behaviour to the detriment of another employee. If the problem is actually the coping skills of the employee and you move them to another department, the problem will likely arise again at the new location. Instead, where reasonable, try to get to the issues in the relationship and develop a solution. This would not prevent the employee from applying for a transfer through standard methods and it has the additional benefit of teaching two people new communication and interacting skills. Overall, avoiding the use of accommodation as a means of career movement helps to reduce abuse of the system.

12. A worker’s anger should never be tolerated in the workplace.

If the participant answers:	Provide this rationale:
a) True.	Incorrect. Anger is an unavoidable human emotion. We all experience it at times. Although anger is one of the more difficult emotions managers must deal with in the workplace, a helpful approach is to try to understand what has lead to the worker’s anger response. Anger is often a secondary emotion – meaning that it’s the way another emotion (such as fear, worry, sadness) presents itself. Considering the underlying emotion behind anger can help managers understand what a worker is experiencing, and can help in working toward effective solutions.
b) False.	Correct. Although disrespectful, abusive or violent behaviours should never be tolerated in the workplace, anger itself is a very common emotion that all of us will have to deal with in the workplace on occasion (both our own anger and workers’ anger). It can be helpful for a manager to understand what has lead to the anger response. Anger is often a secondary emotion – meaning that it’s the way another emotion (such as fear, worry, sadness) presents itself. Considering the underlying emotion behind anger can help managers understand what a worker is experiencing, and can help in working toward effective solutions.

13. To be fair as a manager, it is important to react in the same way to any worker exhibiting negative emotions in the workplace.

If the participant answers:	Provide this rationale:
a) True.	Incorrect. Fairness can be an important value for managers to uphold, but fairness is not always achieved by treating workers in the same way. True fairness arises when a manager finds the best solution for each worker, and this happens when the manager reacts flexibly, responding to workers’ unique needs and challenges. A great strategy is to tailor your communication style and overall approach to the individual(s) and situation at hand.

If the participant answers:	Provide this rationale:
b) False.	Correct. It is important to react flexibly, adapting to workers' unique needs and challenges. Although reacting to all workers in the same way may conform to an abstract and narrow notion of fairness, it fails to account for human differences, and is therefore ineffective. Consider a situation in which two workers are having the same anger response. One is angry because she has had to miss an important family event to fix someone else's mistakes on a project. The other is angry because the coffee is cold. Treating them in the same way would be quite unfair. Remember also to tailor your communication style to the individual and the situation.

14. When a worker is upset, the best thing you can do is be sympathetic.

If the participant answers:	Provide this rationale:
a) True.	Incorrect. Sympathetic statements (e.g., "I'm so, so sorry to hear about the problems you are having") can on the surface seem helpful, but they can also sometimes sound patronizing or unhelpful, as they do not convey to workers that you truly understand and appreciate what they might be experiencing. 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 much more helpful.
b) False.	Correct. When a worker is upset, one of the best approaches is to be empathetic, which goes a step beyond sympathy. Sympathetic statements alone can sound patronizing or unhelpful. Empathetic statements (e.g., "I can imagine that it must be so difficult to focus on work while you're dealing with your mother's health issues") communicate a deeper understanding of what a worker is going through, and are often perceived as much more helpful.

15. When a worker or group of workers is expressing negative emotions – e.g., due to a conflict or low morale – the best strategy is to think...

If the participant answers:	Provide this rationale:
a) "I should not interfere, because I could worsen the situation by upsetting them further."	Incorrect. Don't let fears about your ability to deal with negative emotions prevent you from acting effectively. If you use the tools and knowledge you have gained from <i>Managing Emotions</i> , your intervention in the situation is very likely to improve matters or at least provide workers with some time to calm down and reflect.

If the participant answers:	Provide this rationale:
b) "All workers have ups and downs. This will sort itself out, and it's really none of my business."	Incorrect. While it's true that everyone experiences negative emotions in the workplace at times, an important part of your responsibilities as manager is to effectively negotiate and resolve emotionally charged disagreements between (and with) workers.
c) "I should respond aggressively so they know that there will be consequences when they let their behaviour slip."	Incorrect. Although it can be tempting to communicate aggressively (or passive-aggressively), any seeming short-term gain in resolving a problem is likely an illusion. The problem hasn't been solved, but just temporarily "scared away". Assertive, straightforward communication is much more respectful and effective in the long term.
d) None of the above.	Correct. Skills in resolving conflicts and boosting morale are important to effective management. It is almost always best to intervene in situations in which negative emotions are playing a central role. Ignoring these situations may feel more comfortable in the short term, but it can allow problems to simmer and worsen. It is also important to recognize that for many workers expressing negative emotions is a clear sign that they wish for someone to step in and help resolve a situation. Turning away from such situations can seem highly unsupportive. As long as you use respectful, supportive and non-judgmental communication, your intervention is likely to be effective and appreciated.

16. What important function do our emotions serve?

If the participant answers:	Provide this rationale:
a) They motivate action.	Incorrect. In addition to motivating action, emotions also communicate useful information to others and communicate useful information to ourselves about the things that are important to us.
b) They communicate useful information to others.	Incorrect. In addition to communicating useful information to others, emotions also motivate action and communicate useful information to ourselves about the things that are important to us.
c) They communicate useful information to ourselves about the things that are important to us.	Incorrect. In addition to communicating useful information to ourselves, emotions motivate action and communicate useful information to others.

If the participant answers:	Provide this rationale:
d) All of the above.	Correct. Emotions serve several important functions. For example, worry about an upcoming deadline helps motivate action (e.g., re-scheduling non-essential work tasks), communicates useful information to others (e.g., communicates to co-workers that we may need their support), and communicates useful information to ourselves about the things that are important to us (e.g., that we want to perform well in our job).

17. Workers need to develop the skills to deal with my negative emotional reactions, whatever they may be. It's not my responsibility to guess how every worker will feel in a situation.

If the participant answers:	Provide this rationale:
a) True.	Incorrect. While it's true that everyone in the workplace should build skills in managing their emotional reactions, it is also true that individuals must be aware of how their reactions affect others. This applies in particular to managers, because their roles and position mean that they can have a strong influence on emotions in the workplace. Leaders are a strong source of "emotional contagion", meaning their moods can have a major impact on others.
b) False.	Correct. As the manager, most workers pay careful attention to you and your reactions, meaning you can play a powerful role in shaping their emotional reactions in certain situations, as well as how they feel about work in general. As a leader, you are a strong source of "emotional contagion", meaning your mood can have a significant impact on others. It is your responsibility to be aware of how your emotional reactions affect others and to be aware that every worker is different and will respond to you differently.

18. As a manager, it is important to always hide my emotions.

If the participant answers:	Provide this rationale:
a) True.	Incorrect. Although it can be tempting as a manager to want to always hide your emotions, remember that your emotions play a few important roles. They often provide you with useful information about situations and about your goals and needs. Often, even when we try hard to hide our emotions, others can pick up on our emotional state, and not being straightforward about it can be more confusing and demoralizing for workers than a respectful, yet emotional, response.

If the participant answers:	Provide this rationale:
b) False.	Correct. It is not realistic (sometimes it's almost impossible) to completely hide our emotions. What is important is to ensure that we are aware of our emotion states, that we take responsibility for our emotional reactions, and that our behaviours (verbal and non-verbal) toward workers remain professional and respectful.

19. With a little effort and planning I can take control of my stress levels at work and their effects on myself and others.

If the participant answers:	Provide this rationale:
a) True.	Correct. Stress can seem inevitable, and small amounts are inevitable for many or most people in the workplace, but with practice and planning you can learn to minimize your exposure to stress and to deal with stress more effectively when it's unavoidable. By paying attention to the types of situations that tend to cause you stress, you can learn to prepare for them or possibly avoid them. When you can't avoid a stressful situation, there are useful tools for coping more effectively in the moment. You'll reduce your negative emotional responses and make your impact on others in the workplace and elsewhere more positive.
b) False.	Incorrect. Stress seems at times like an inevitable aspect of work, but this is partly because many people give up the hope of keeping it under control. And yet stress can be minimized when you create strategies for anticipating it and responding as effectively as possible. With some effort and planning, you can reduce the stress you feel at work, reduce the negative impact your stress may have on others, and learn to prevent workplace stress from interfering with the rest of your life.

MANAGING MENTAL HEALTH MATTERS

POST-EVALUATION

The following evaluation has been developed to measure your thoughts, feelings and behaviours related to managing mental health issues in your workplace. Please complete this evaluation prior to participating in the *Managing Mental Health Matters* program and again following successful completion of the training program.

For each of the questions below please rate your response based on the following scale:

1 = Not at all

5 = Somewhat/sometimes

10 = Absolutely

1. I am comfortable addressing mental health issues in the workplace.

1 2 3 4 5 6 7 8 9 10

2. I have the skills and strategies I need to approach a distressed employee.

1 2 3 4 5 6 7 8 9 10

3. I feel I can facilitate mutually agreed upon approaches when dealing with people and problems at work.

1 2 3 4 5 6 7 8 9 10

4. I believe that individuals with mental health issues are difficult to manage and work with.

1 2 3 4 5 6 7 8 9 10

5. I am aware of the signs and symptoms of mental health issues for individuals in the workplace.

1 2 3 4 5 6 7 8 9 10

6. I know how to reasonably accommodate an employee experiencing emotional distress or a mental health issue at work.

1 2 3 4 5 6 7 8 9 10

7. I understand the legal requirements for reasonably accommodating an employee who has a mental health-related disability.

1 2 3 4 5 6 7 8 9 10

8. I feel confident addressing performance issues with an employee I suspect may be dealing with a mental health-related issue.

1 2 3 4 5 6 7 8 9 10

9. I am skillful in resolving conflict between co-workers so that both employees are satisfied with the outcome.

1 2 3 4 5 6 7 8 9 10

10. I know the steps to take to assist an employee to return to work after a period of absence due to a mental health issue.

1 2 3 4 5 6 7 8 9 10

Name: _____

Date: _____

This is to certify that

has successfully completed

EPISODE 5
MANAGING RETURN TO WORK



Date

Authorized Signature

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



Working Through 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



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