



# Supporting success from the top down:

**How to equip leaders with mental health awareness to foster a psychologically healthy workplace.**



**“There comes a point where we need to stop just pulling people out of the river. We need to go upstream and find out why they’re falling in.”**

Attributed to Desmond Tutu, Human Rights Activist



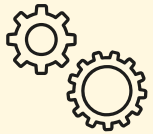




**Employees value leaders who are trained to understand mental health, champion available supports, and integrate wellness into the organization's strategic mission.**

- Leaders can have the greatest impact on culture
- With the right training, leaders are instrumental in fostering a psychologically safe workplace
- Identify issues early. Early intervention improves outcomes

# Five stages of building a workplace mental health strategy



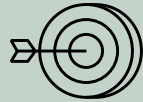
## 1. Building the foundation

- Setting the right tone for your organizational culture



## 2. Identify opportunities

- Data driven & strategic approach



## 3. Set priorities and objectives

- Set targeted, measurable and realistic objectives that align with overall business strategy



## 4. Taking action

- Targeted solutions
- Mandatory leadership training



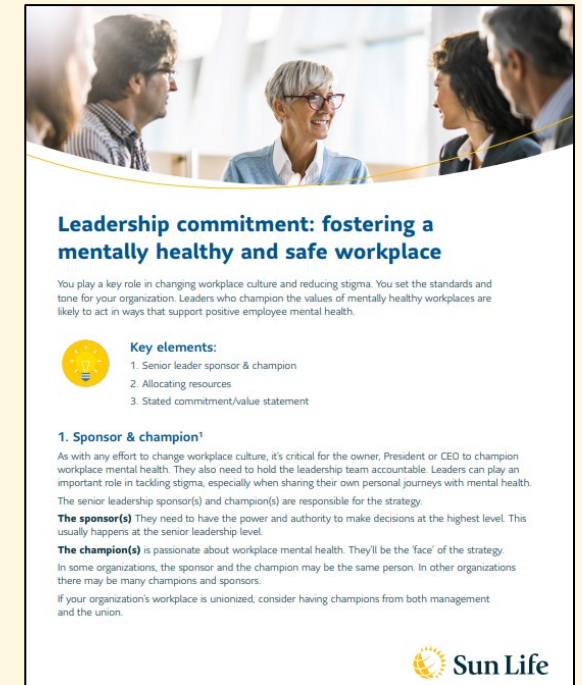
## 5. Re-evaluate

- Continual review process
- Adjust goals and take corrective actions

# Building the foundation

## Key elements

- Background (key stakeholders, current state, why building strategy now, anticipated outcomes)
- Priorities and objectives (OKRs, KPIs)
- Senior leader sponsor and champion
- Allocating resources
- Stated commitment/ value statement



## Resources available at Sun Life:

- ✓ [Building a workplace mental health strategy for your organization](#)
- ✓ [Leadership commitment: fostering a mentally healthy and safe workplace](#)



# Identify opportunities

Using data is critical to measure your baseline and to identify your organization's unique risks and opportunities. It is also a key element to ensure you're focusing your effort on the right place.

## Self-reflection questions:

- What are you doing well?
- What are your opportunities?
- What do your employee comments tell you?
- Is their alignment between senior leaders and your employees on their view of your workplace culture?
- How are employees using their benefits (absence, EHC, EAP)? Does the usage align with your top diagnostic categories?





## Assessment and evaluations of best practices to maintain a healthy workplace

A focus on health and wellness is a constant effort, not a one-time happening. The work doesn't stop when you launch your organizational health strategy. There needs to be a continual review process. This is because your organization's needs, and effective strategies, may change over time.

### Key Elements:



#### Set Key Performance Indicators (KPIs) to evaluate the health and program initiatives over time

Using data to measure success is the key to creating a solid workplace health strategy. Decide early how you will quantify your goals. These quantified objectives will be your key performance indicators (KPIs).

For each priority and specific goal, assess the data to see if you're achieving your desired outcomes. This will help you see if the programs and solutions you've put in place are working.

#### How to measure success:

- Use data to measure progress
- Track Key Performance Indicators (KPIs) – note: most companies track metrics quarterly
- Decide which actions have been effective and which haven't
- Use data insights to decide next steps

#### Using different types of data will ensure a complete approach to your strategy and programs. Be sure to include:

- Quantitative (objective) data
- Qualitative (subjective) data
- Leading indicators (events leading up to/predictive of future outcomes), and
- Lagging indicators (events that have happened in the past)

#### Examples of KPIs:

- Health Risk Assessment results
- Number of health and wellness events scheduled
- Participation in health and wellness events
- Employee turnover rates
- Absenteeism rate (total sick days, sick days by business team, sick days by manager/director, etc.)
- Number of leaders who participated in manager mental health training

### Tracking and review of data

A continual review process because your (and effective strategies) may change back and data to measure outcomes organizational health strategy.

#### and data

Work and/or data will depend on the size and what you have access to.

Options this could be as simple as:

Engagement survey sent to employees (if your employees don't have a survey)

Door policy

Conversations

Meetings or during a 1:1 discussion

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### Is it achieving its intended outcomes?

- Is there alignment between senior leaders and your employees on their view of your workplace culture?
- Do you have the right benefit plan design? Does your plan design reflect the most common health issues in your organization?

#### C) Adjust

Adjust and update your goals, targets, and action plans

- Take any corrective actions needed
- Update any of the relevant policies and procedures



### Report back to employees following all surveys

When reporting back to your employees, you should also include concrete actions that you'll take following the survey and how success will be measured.

Communicate results, successes and action plans

- Identify different ways to communicate that will improve understanding and enable you to share updates.
- It's important to then report to your employees on your progress and any corrective actions taken.



### Review your strategy and programming at least annually

How often you review your progress depends on what works best for your company:

- Start with a monthly review of your initial progress,
- Move to quarterly reviews and progress reporting to stakeholders, and
- Review and report on outcomes annually, including where they are relative to their baseline.

- What are you doing well?
- What are your opportunities?
- Is the strategy you've implemented working?
- Is it suitable with the means and resources you have?

# Setting priorities and objectives

- Align with overall business strategy and goals
- Set a key performance indicator (KPI) specific to mental health
- Focus on total well-being
- Set targeted, measurable and realistic objectives

## Resources available at Sun Life:

- ✓ [Best practices to maintain a healthy workplace](#)



# Taking action

## Targeted solutions

An effective communication plan is critical to the success of your strategy. It's important to your employees to know what you're doing and why it matters.

### Key elements

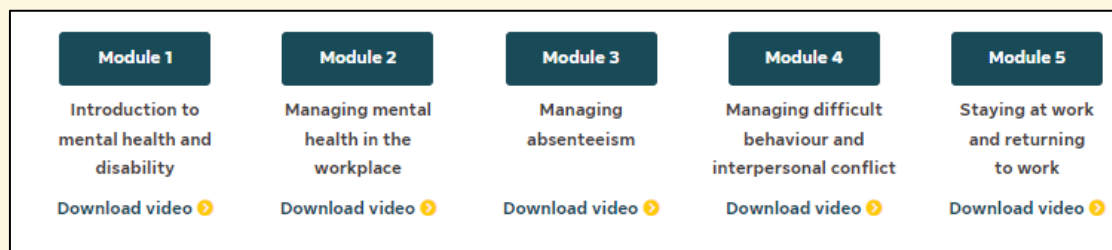
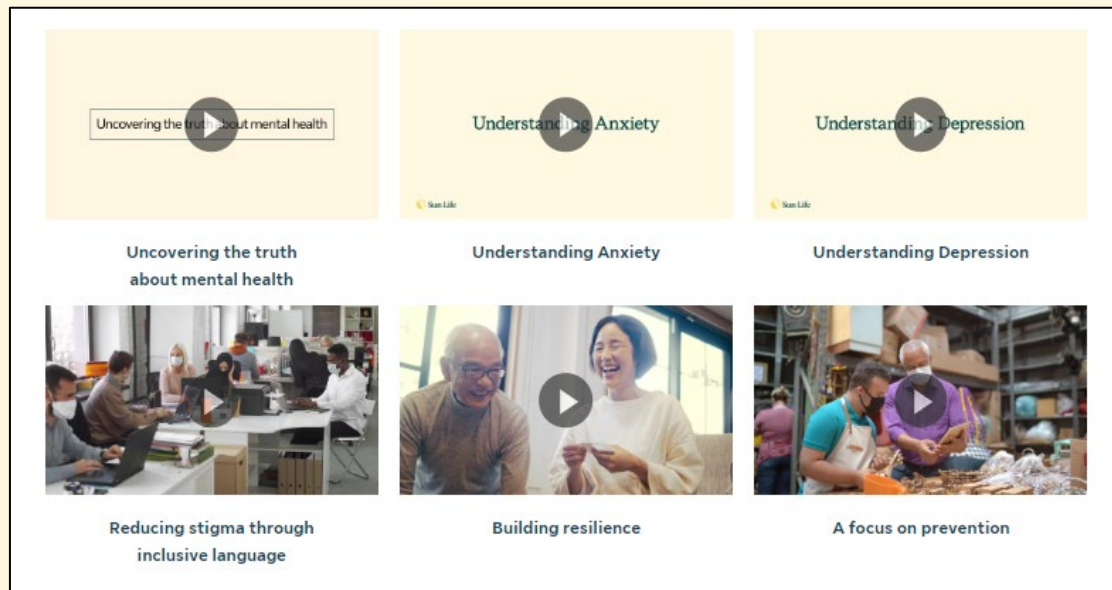
- Create a communications strategy
- Ensure that there is high visibility and high employee recognition
- Use a variety of communication methods to build awareness of goals, events and resources



### Resources available at Sun Life:

- ✓ [Communication best practices to support a healthy workplace](#)





## Resources available at Sun Life:

- ✓ [Mental health training](#)

# Taking action

## Mandatory leadership training

Empower your leaders to put workplace mental health and well-being at the center of their leadership approach.

### Be methodical with your approach:

- Tie into business strategy to hold leaders accountable
- Progressive learning (tiered approach, foundational first and then ongoing)
- Leverage your partners

# Re-evaluate



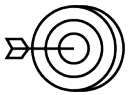
## Continual review process

- an analysis of key outcome data
- a review of significant findings
- SLATE – survey, listen and talk to employees



## Continuous improvement

- Is the strategy you've implemented working?
- Is it suitable with the means and resources you have?
- Is it achieving its intended outcomes?



## Outcomes of the review:

- Opportunities to improve and take any corrective actions;
- Update any of the relevant policies and procedures;
- Adjust and update goals, targets, and action plans; and
- Identify different ways to communicate that will improve understanding and enable you to share updates.





# Summary

- Build the foundation – leaders set the tone
- Identify opportunities – take a purposeful, data approach
- Setting priorities and objectives – demonstrate a clear commitment to mental health
- Taking action – empower and train leaders
- Re-evaluate – S.L.A.T.E

Thank you!