

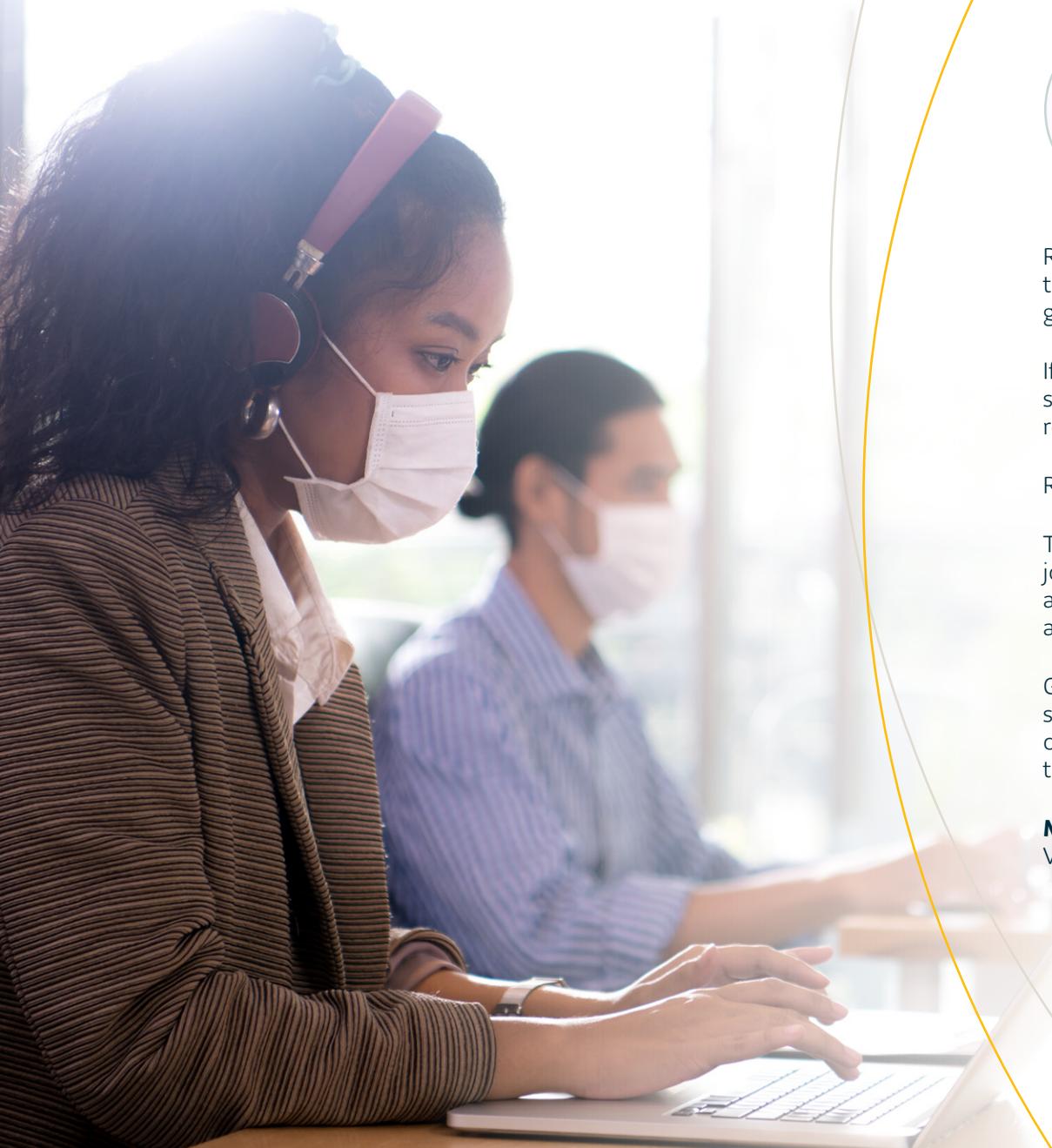


Life's brighter under the sun

## Improving workplace mental health: three companies, three great success stories

Many employers are taking action right now to address the mental health crisis. Your organization can too – with a wide range of supports available from Sun Life.





Taking a strategic approach to employee mental health pays off. It's the right thing to do for your employees and your business. Research is proving its benefits and bringing them to the forefront.

At Sun Life, we're fortunate to see these benefits first hand. Our work helping employers achieve their organizational health goals has shown us that with the right approach, great things are possible.

Results don't come overnight. Strategies that deliver significant results require commitment and time to mature. However, many employers we work with begin to see positive changes by just getting started with the right strategy.

If you are like many employers, you may not know where to start to build a mental health strategy. You may think your organization is too small, or that you don't have the necessary resources. For many, developing a strategy can seem like a daunting task.

Rest assured, it doesn't have to be. There is support available and examples you can follow.

This paper features the inspiring, real-life stories of two employers. We also recap our own journey to support and improve the mental health of Sun Life employees. Collectively, we've all achieved significant results. These include lower disability claims, reduced short-term absences and greater engagement in supports like employee and family assistance programs.

Great things are possible. Sun Life is here to help guide you along the way. Many of our supports and innovations for mental health are based on pilots and learning within our own organization. We understand what strategies work because we've launched, tested and refined them at Sun Life first. Please read on to see how, together, we can make a difference

**Marie-Chantal Côté**

Vice President Market Development, Group Benefits



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# A successful mental health strategy is within reach of all organizations



A “one-size-fits-all” approach to workplace mental health doesn’t exist. However, those who’ve already set out to improve mental health in their organizations offer important insights and inspiration. We can learn from their successes and adapt their actions to our own workplaces. The three case studies in this paper give you great examples of what is possible for your organization.

Still, many employers may see addressing mental health in their workplace as daunting. It doesn’t have to be. A successful mental health strategy is within reach of all organizations, no matter the size or available budget. And there are resources that can help guide you.

A great example is our free, one-stop online resource, the [mental health strategy toolkit](#). It guides you, providing practical tools, information and resources. It’s aligned with the Mental Health Commission of Canada’s National Standard of Canada for Psychological Health and Safety in the Workplace. It also draws on our own experience in helping Clients improve workplace mental health over the past decade. If you haven’t known where to begin, the toolkit is a great place to start.

Support is also available from our [Integrated Health Solutions \(IHS\) team](#). Our [Organizational Health Consultants](#) on the IHS team have over a decade-long track record using best practices to improve workplace health outcomes. They help assess your needs and risks and work with you to develop the best strategy for your organization.



## Fundamentals for success

As the case studies in this paper show, a variety of tactics can help improve workplace mental health. But our years of experience have taught us three components must first be in place to achieve success:

- **Leadership commitment.** Leaders play the most important role in changing workplace culture and reducing stigma. They set the standards and tone for their organization.
- **Baseline assessment of current state.** Before acting, you must understand your organization’s needs and risks. Readily available data like mental health disability trends or engagement surveys can help you get started.
- **A strategy.** Simply stated, the tactics you choose need to address your organization’s specific mental health needs and risks.



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# The Sun Life mental health strategy toolkit

## A free resource to help you take action

Our [mental health strategy toolkit](#) is a free resource. It guides you step-by-step, providing practical tools and resources to improve workplace mental health.

We built the toolkit based on our own organizational health consulting best practices. We know the approaches work because we've seen them work with organizations of every size – in every industry. It's a one-stop-shop that brings together all our mental health practices, tools and resources. It walks you through the stages of building a strategy, integrating access to our solutions. This includes:

- Information on what factors influence mental health in the workplace
- Advice on assessing your organization's mental health needs and setting mental health objectives
- Specific tips on talking to employees about mental health
- Manager mental health training videos
- Return-to-work tips for managers
- Key metrics for measuring success.

Sun Life has been providing organizational health support to our Clients through our Integrated Health Solutions team. Sun Life, as an employer, has also been an Integrated Health Solutions Client for the past five years.

But we do more than just “walk the talk.” We use our own workplace as a proving ground for new, innovative practices in employee health. Our mental health strategy toolkit is a culmination of this test-and-learn approach within our own organization.

The case studies below showcase what’s possible. They highlight our commitment to bringing our tested best practices to you in supporting the health of your employees.



## Sun Life’s “test and learn” process for bringing health innovations to market

Sun Life has a large workforce that represents a cross-section of the many Client groups we serve. Our employee base is ideal for piloting and refining the health innovations that we bring to our Clients. It also ensures that Sun Life “walks the talk” when it comes to supporting and improving employee mental health.

Recent innovations that we first launched, tested and refined at Sun Life include:

- Increasing the mental health practitioner benefit maximum from \$1,200 to \$12,500 to remove financial barriers to treatment
- Providing gender affirmation coverage for surgical procedure costs not covered under provincial health plans
- Offering pharmacogenomic testing for employees on mental health-related disability to help identify the most effective drug for them. Plan sponsors can also elect to include pharmacogenomics as a covered expense under their EHC plan.
- Introducing virtual cognitive behavioural therapy (CBT) for employees on disability leave for mental health issues. Online CBT is also now a reimbursable expense under Sun Life EHC plans.

For each of these innovations, we developed a “best practice” approach by measuring the uptake and impact with our own employees. Today, we’re sharing these best practices with Clients to benefit their workplaces.



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## About the Sun Life case study

Sun Life has had an organizational health strategy for many years – with a framework firmly in place. To target our programming and measure outcomes, we use an organizational health scorecard with the following data points:

- Drug and paramedical use
- Casual absence and disability rates
- Demographics
- Clinical data from employee health risk assessments and health screening, including employee feedback
- Employee assistance program and existing wellness program use.

When our mental health claims began rising, we pivoted our strategy to focus on our key drivers of disability.

The results in the case study below highlight our mental health outcomes only. These outcomes reflect our broader multi-year focus on workplace health and subsequent focus on mental health that began in 2016.<sup>1</sup> This aligns with other industry studies showing it can take three to four years to see positive results.

<sup>1</sup>CAMH's Mental Health Playbook for Business Leaders; Deloitte, (2019), The ROI in workplace mental health programs: Good for people, good for business - A blueprint for workplace mental health programs. Deloitte Insights.

# Case study #1 – The Sun Life mental health journey

You likely know Sun Life as a benefits and pension provider and insurer. But we have another important role – as an employer to more than 11,000 employees across Canada.



## The opportunity

We faced the same challenges as many other employers in terms of employee health. Specifically, disability rates were increasing, and we wanted to take action.

With mental health-related costs growing, we worked closely with the Integrated Health Solutions (IHS) team to reevaluate our priorities. We wanted to assess the cause of this trend and, importantly, create a strategy to improve employee mental health.

- **Stigma.** The low use of psychological services, plus other data, suggested there was stigma attached to mental health. Employees were not seeking support when they needed it
- **Lack of awareness of resources available.** Employee awareness of the resources available to them to support their mental health was low.
- **Risk differed across the organization.** The types of risk varied across parts of the business, as did risk levels.



## The actions

With the evaluation complete, we worked with the IHS team to identify opportunities and to set priorities and objectives. Here's how we put our mental health strategy into action:

- **Increased the psychology benefit maximum.** We increased the annual coverage maximum from \$1,200 to \$12,500 to remove financial barriers to treatment.
- **Expanded the list of eligible practitioners for mental health.** We aligned the list of eligible practitioners with that of our employee and family assistance program (EFAP). This provides greater choice in treatment. It also ensures continuity of care.

Someone seeing a therapist through EFAP can use their coverage to see that professional after their EFAP sessions end.

- **Launched mental health training and anti-stigma programs.** We provided manager mental health training enterprise wide. Managers were taught how to spot at-risk employees and provide support before they reached a crisis stage.
- **Tailored programing to target higher-risk areas.** We identified higher-risk areas (such as the call centre) and provided additional training that addressed their specific needs.
- **Created consistent, streamlined information.** We simplified the messaging about the supports available to employees. This was consolidated into a “one-stop” resource on the employee website. We then followed this up with a communications plan.



## The approach

We worked together to assess our current state using two measures. The first was an [Integrated Health Insights Report](#), a comprehensive analysis of employee and organizational health data. The second was completion of our own [Workplace Mental Health Risk Assessment](#).

These measures revealed important areas for improvement:

- **Low mental health benefits use.** Claiming for psychological services was low compared with the mental health risks facing the organization. The data suggested that many employees were not seeking treatment early enough to prevent time off work.



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- **Provided treatment prompts to those at risk.** When an employee made a drug claim linked to depression, Sun Life’s digital assistant (“Ella”), sent them a communication. This included health information and action-oriented suggestions to help them manage their condition.
- **Launched an employee digital wellness platform.** We brought many of our wellness initiatives together in a digital wellness program. The program included individualized health content, risk assessments, goal setting and trackers where employees were incentivized to take action.



## The results

These initiatives were associated with significant improvements in measures related to employee mental health\*:

- **Lower Long Term Disability (LTD) claims.** There was a 38% decrease in the new LTD claims incidence rate. This was driven by a 36% decrease in new mental health claims. The 2019 incidence was the lowest in four years.
- **Higher resolution of LTD claims.** There was a 22% increase in resolved LTD claims. Fewer new claims and more resolved claims resulted in a positive impact on LTD financials and paid claim costs.

- **More plan employees seeking psychological support.** The number of employees claiming for mental health medication had been 300% higher than those utilizing psychological coverage. Since 2015, the number of employees utilizing their psychology benefit has increased 225%. This is now much more aligned with supporting the needs of employees.
- **Shorter disability leaves for those who sought early treatment.** Short-Term Disability (STD) durations were approximately two weeks shorter for those who used their psychological coverage before making their STD claim. This supports the removing of financial barriers to treatment by increasing the psychology benefit maximum.
- **Lower rate of absence for those in treatment.** Casual absences were 0.8 days less for employees who used their psychological coverage compared with those claiming only mental health medicines. Similar to the previous point, this outcome supports removing financial barriers to treatment.
- **Stigma / engagement.** In 2016, 70% of employees surveyed felt it was safe to speak up. This has increased to 72% in 2019 and 80% in 2020. Feeling able to speak up is an important indicator of a psychologically safe workplace.



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- **Re-evaluate.** We’ve committed to completing an Integrated Health Insights Report each year. We’ll also continue to monitor our leading and lagging indicators (such as casual absence and disability) at regular intervals.
- **Test and learn – new mental health coach pilot.** In 2021, we’re piloting an innovative mental health coaching program with our own employees. The employee is offered the opportunity to engage with a personal coach – a trained mental health professional. The coach knows the employee’s available coverage and resources and can guide them on their individual mental health journey.

We will be assessing the program’s effectiveness. If the impacts are positive, we look forward to rolling out the program to Clients over the next year.

\*Unless indicated otherwise, results shown are based on a comparison of 2017 and 2019 data.

Note: Sun Life’s broader multi-year workplace health strategy supported achieving these results. This is consistent with research that shows it can take three to four years to see positive results from workplace mental health strategies.<sup>2</sup>

<sup>2</sup> Ibid.



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# Case study #2 – Risk assessment makes way for new opportunities



## The employer

An international engineering and construction company, with about 1,500 employees across Canada.



## The opportunity

The company had a long-established goal to provide employees with the tools to thrive under four wellness pillars: mental, physical, financial and social.

However, with newly appointed senior management, the company wanted to renew their employee well-being mandate. In particular, the leaders were well aware of the rise in mental health issues among Canadians. They wanted to be proactive to ensure they were supporting their employees.



## The approach

The company enlisted the help of the Sun Life Integrated Health Solutions (IHS) team. The Sun Life team suggested facilitating an organizational health risk assessment, using Sun Life’s [Workplace Mental Health Risk Assessment](#). This would help identify opportunities and priorities for the company’s mental health culture, policies and practices. It would also ensure alignment with the National Standard of Canada for Psychological Health and Safety in the Workplace.

The company leaders completed the risk assessment process in early 2018. This process led to significant learning and an innovative approach. However, rather than have the leadership team alone identify opportunities, they decided to run a second assessment – this time with a group of employees representing all departments and groups within the organization.

The assessment with employees validated many leadership perspectives about the organization’s culture, policies, and practices. But it also provided insights into gaps, such as mental health knowledge for managers and employees.

Based on the assessment, the company developed their mental health strategy. They also established a mental health taskforce of management and employees to implement and report on mental health actions.



## About Sun Life’s Workplace Mental Health Risk Assessment

A key support that we offer organizations is assessing the mental health risks that their employees face.

Our [Workplace Mental Health Risk Assessment](#) aligns with the 13 Psychological Risk Factors of the [National Standard of Canada for Psychological Health and Safety in the Workplace](#). The assessment was created in collaboration with Dr. Arla Day, a world-renowned researcher in Organizational Psychology.

- The assessment is thorough. It relies on both qualitative and quantitative measures. Quantitative responses are based on organizational data, such as turnover, short-term disability, Employee Assistance Program use and casual absences.
- Comprised of 150 carefully designed questions, it provides a detailed view into your organization’s strengths and opportunities for improvement.

Following the assessment, you are provided with a comprehensive report and debrief. This includes recommendations for next steps. From there, our team is available to help you develop the best strategy for your organization.



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## The actions

Key initiatives to put the strategy into action included:

- **Manager mental health training across all levels.** The company took a phased approach to training to ensure engagement would be sustained. It started with senior leaders and front line managers. Due to restrictions and challenges brought about by COVID-19, training continues to evolve. Manager and employee training is now online.
- **Increased the mental health practitioner benefit maximum.** The company increased the annual benefit maximum covered by its plan to \$5,000.
- **Expanded eligible services covered.** The company added a wider range of mental health practitioner types eligible for coverage. They also introduced coverage for virtual Cognitive Behavioural Therapy.
- **Encouraged active living.** The company launched a physical activity tracking app to help encourage active living.



## The results

These actions have helped the company put itself in a stronger position to deal with the challenges of COVID-19. This includes:

- **Lower than average STD mental health claims.** The company approved mental health claims that were 11% lower than the industry benchmark.
- **Low incidence of LTD disability claims.** LTD incidence across all claim types has remained 50% below the industry benchmark.
- **Higher use of the employee and family assistance program (EFAP).** The company increased the use of its EFAP from 3% -5% before the assessment process to 9% in 2019.



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## Case study #3 – Springing to action with manager training during COVID-19



### The employer

A Canadian financial services company with about 2,000 employees in Western Canada.



### The opportunity

The company had a solid wellness culture. This included a focus on the three pillars of health: physical, mental and financial. But this wellness focus had not shielded the company from the broader societal trend of increasing mental health problems.

The company's short-term disability claims relating to mental health had doubled in two short years. During that same period, 42% of long-term disability claims were also mental health-related.

Alarmed by this trend, they engaged our Integrated Health Solutions (IHS) team. They wanted to take action fast, building on their already strong culture of wellness and support.

Shortly after engaging the Sun Life team, the pandemic struck and the company decided to act without delay.



### The approach

The company's culture emphasized providing managers with tools to be supportive and empathetic people leaders. And one of the most important tools identified was mental health training. As the pandemic began to unfold, providing managers with this training became even more critical.

Together with the Sun Life team, the company sprang into action to implement a three-phase manager mental health training program.



### The actions

With the pandemic, and most employees working from home, the role of managers had significantly shifted. Oversight and support were now virtual. Managers needed to understand the unique mental health challenges that employees could be facing given the new circumstances. The training curriculum reflected this new reality.

The three-phase training format was delivered virtually by the IHS team between April and June 2020:

- **Phase 1: Online e-learning manager mental health training modules.** Modules were available 24/7 and provided an overview of foundational mental health topics. Managers had to complete all modules before participating in Phase 2.

- **Phase 2: Mental health live webinars.** Sun Life's Director of Mental Health, a registered psychologist, presented two live webinars:
  - *Webinar #1: Managing Absence and Promoting Mental Wellness in the Workplace.* This webinar built on the information provided in the Sun Life e-learning modules.
  - *Webinar #2: Promoting a Healthy Workplace: Putting the National Standard for a Psychologically Healthy and Safe Workplace into Practice.* This webinar explored the 13 Psychological Risk Factors of the National Standard of Canada for Psychological Health and Safety in the Workplace.
- **Phase 3: Q & A with Sun Life's Director of Mental Health.** This was an open forum. Managers submitted questions in advance that were answered during the webinar by the Director of Mental Health. Questions were also taken and answered through online chat in real time during the session.

Senior leadership participated in all webinars, but managers did not hesitate to share their comments and concerns. This culture of openness was apparent prior to COVID-19 and had not shifted, even in a virtual work environment.



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## The results

It's too early to measure possible outcomes of the program on metrics like disability claims. However, the actions taken have made a significant impact on the organization.

More than 140 managers participated in the training – far exceeding the company's expectations. That is 140 people leaders across the organization with new skills to recognize struggling employees and support them.

The success of the training program has given the company momentum to introduce more positive change. They have since taken several additional steps to ensure that employees who need help have access to available resources. These include:

- Providing free online therapy sessions for six months to all employees and their families.
- Increasing the annual psychological coverage by \$500 for a three-month period. The aim is to encourage those who need help to get it sooner than later.

- Providing a personal video message of support to all employees from the senior HR leader. This message encouraged employees to break down mental health stigmas and use the resources available to seek help.
- Holding online employee sessions to highlight the mental health resources available to them.
- Adding the the online e-learning manager mental health training modules in their Learning Management System. This enables managers to access the content at any time.
- Continuing to encourage managers to review the online e-learning manager mental health training modules.

In partnership with Sun Life, the company will evaluate the results of its initiatives. This includes monitoring disability claims, benefit utilization, participation in mental health initiatives and employee engagement scores.



## A free resource – Sun Life manager online mental health training

The company in Case Study #3 incorporated our free online manager mental health training series into their customized program. These five [online manager training videos](#) are available to all employers 24/7 at no cost.

Through self-teaching video modules, your people leaders learn to:

- Identify potential mental health issues in your workplace
- Communicate effectively
- Help build a healthy environment
- Identify and address the stigma related to mental health issues.



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## Higher mental health practitioner benefit maximums – breaking down the cost barrier to treatment

Many benefit plans cap their coverage for mental health practitioners at \$500 per year. Often this is a combined maximum – shared with other services like chiropractic care. This often falls far short of funding the number of sessions required for effective treatment.

It's clear that cost can be a barrier to treatment, as demonstrated by a recent [Canadian Psychological Association \(CPA\)](#) survey. Sixty-six percent of respondents said a lack of benefits plan coverage is a barrier to seeking treatment.<sup>3</sup>

Increasingly, employers are viewing higher coverage maximums as an investment, not a cost. By eliminating the financial barrier to treatment, they are focusing on reducing absences, lowering disability rates and returning those on disability leave to health and work faster.

The CPA recommends a standalone annual coverage maximum of between \$3,500 to \$4,000. This amount provides coverage for 15-20 sessions. This is the number of sessions required to achieve a therapeutic outcome for people suffering from depression or anxiety.

<sup>3</sup>2020 Nanos poll conducted on behalf of the Canadian Psychological Association (CPA): <https://cpa.ca/strong-majority-of-canadians-want-improved-access-to-psychologists/>



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## Take your next step on workplace mental health

These case studies demonstrate the great potential to improve workplace mental health with the right approach. The pandemic has made having a mental health strategy that much more critical.

The results achieved by our organization and others are repeatable. Success doesn't mean needing a large budget. Leadership commitment, the right data, time and effort, and better use of existing resources can make a difference. A successful strategy is within reach of all organizations. You don't have to do it alone.

Our [mental health strategy toolkit](#) is free to use. It's based on our years of experience working with Clients to create healthier workplaces. It's also based on the extensive testing we've undertaken within our own organization to find solutions that work. It's a great resource to help organizations get started, as well as to help employers already on their journey.

For further support you can contact your Sun Life Group Benefits representative. They can connect you with our [Integrated Health Solutions \(IHS\)](#) team. Our IHS team will partner with you to evaluate your needs and help develop and implement your strategy.

We're here to help. [Learn more](#) about these supports and others available to you.



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