



[Sample mental health strategy & template]

# Building a workplace mental health strategy for your organization

Every organization is unique. There's no one-size-fits all approach to building your workplace mental health strategy. Not sure where to begin? Here's our template and sample strategy to help you get started.

## Background

Think about answering these questions before you begin.

- **Why are you building this strategy now? Is there a specific reason or influence?**
  - For example: legislative, financial, employee driven, mental-health-related disability claims are increasing.
- **What outcomes are you hoping for?**
  - For example: decreased absenteeism, positive employee engagement scores, increased use of mental health resources.
- **Who are your key stakeholders and what will their involvement be?**
  - For example: [Business unit] owns the strategy and reports in to the [Senior Leadership Sponsor Name, Title]. [Name, Title] is the champion and will be leading the strategy development.

## Vision statement

What are the long-term results you're hoping to achieve?

- Summarize these in a short 1-2 sentence statement.

For example: [Organization] empowers and supports employees to achieve optimal mental well-being. We are committed to ensuring an inclusive and respectful work environment, where every employee feels [Organization] is a psychologically safe place to work.

## Current state

What's the main reason you're creating this strategy?

- Feel free to be specific and use relevant data to support this.

For example:

- *Mental health is the leading cause of employee absence and disability.*
- *Employee feedback surveys reveal poor employee engagement.*
- *Employees aren't accessing the resources available for mental health. For example, usage of the employee and family assistance program (EFAP) is lower than optimal utilization rates. Strong utilization is considered around 20%. The average was 11% according to the 2016 Sanofi Canada Healthcare Survey.*

## Priorities and objectives

What are you hoping to accomplish and how will you get there?

- We recommend outlining 3-5 priorities and 2-3 specific objectives for each priority. Your priorities and objectives will guide your actions going forward.

For example:

Key priorities	Objectives
1. Increase awareness and use of mental health resources.	<ol style="list-style-type: none"><li>I. Increase manager comfort level and knowledge about what's available through Employee and Family Assistance Program (EFAP) and how to refer an employee.</li><li>II. Increase employee EFAP usage.</li></ol>
2. Mandatory manager mental health training	<ol style="list-style-type: none"><li>I. Educate managers on mental health fundamentals, and how to identify and support employees who are struggling.</li><li>II. Increase manager awareness of the importance of their role in creating a psychologically healthy and safe workplace.</li></ol>

## Key Performance Indicators (KPIs)

How will you measure the success of your priorities and objectives?

- We recommend creating key performance indicators (KPIs) for each objective.

For example:

Objective	Action plan	KPIs
I. Increase manager comfort level and knowledge about what's available through EFAP and how to refer an employee	<ul style="list-style-type: none"> <li>• Offer virtual manager training on EFAP and make available on-demand through intranet</li> <li>• Include EFAP training in new manager onboarding</li> </ul>	<ul style="list-style-type: none"> <li>• 75% of managers receive/access training by end of 20XX</li> </ul>

## Action plan, timing and resources

How will you achieve your objectives? When are you hoping to achieve them by? What resources will you need to succeed?

- We suggest you include an action plan, timeline and resource list for each of your priorities and objectives.

For example: here's what your action plan might look like:

## Sample action plan

**Priority 1** – Increase awareness and use of mental health resources

Objective	Action plan	Resources	KPIs	Target dates
I. Increase manager comfort level and knowledge about what's available through EFAP and how to refer an employee	<ul style="list-style-type: none"> <li>• Offer virtual manager training on EFAP and make available on-demand through intranet</li> <li>• Include EFAP training in new manager onboarding</li> </ul>	<ul style="list-style-type: none"> <li>• EFAP provider</li> <li>• Benefits &amp; Wellness specialist</li> </ul>	<ul style="list-style-type: none"> <li>• 75% of managers receive/access training by end of 20XX</li> </ul>	<ul style="list-style-type: none"> <li>• Launch QX</li> <li>• Complete QX</li> </ul>
II. Increase employee EFAP usage	<ul style="list-style-type: none"> <li>• Highlight a different EFAP resource in each weekly email staff bulletin</li> <li>• Add EFAP information to new hire packages</li> <li>• Host an education session by EFAP provider as promotion</li> </ul>	<ul style="list-style-type: none"> <li>• EFAP provider</li> <li>• Benefits &amp; Wellness specialist</li> </ul>	<ul style="list-style-type: none"> <li>• Increase EFAP usage from 6% to 12% by end of 20XX</li> </ul>	<ul style="list-style-type: none"> <li>• Launch QX</li> <li>• Complete QX</li> </ul>

## Priority 2 – Mandatory manager mental health training

Objective	Action plan	Resources	KPIs	Target dates
I. Educate managers on mental health fundamentals.	<ul style="list-style-type: none"> <li>Roll out one of the five Sun Life manager mental health training videos weekly.</li> </ul>	<ul style="list-style-type: none"> <li>Sun Life manager mental health videos</li> </ul>	<ul style="list-style-type: none"> <li>100% of managers complete videos by QX 20XX.</li> </ul>	<ul style="list-style-type: none"> <li>Launch QX</li> <li>Complete QX</li> </ul>
II. Train managers on their role in creating a psychologically healthy and safe workplace.	<ul style="list-style-type: none"> <li>Deliver three customized follow-up training sessions that focus on specific skill building. For example, how to identify employees who are struggling, how to have difficult conversations, and managing absences.</li> </ul>	<ul style="list-style-type: none"> <li>Sun Life/Preferred supplier/EFAP provider</li> </ul>	<ul style="list-style-type: none"> <li>75% of managers complete training by QX 20XX</li> </ul>	<ul style="list-style-type: none"> <li>Launch QX</li> <li>Complete QX</li> </ul>

## Key tips

Keep these in mind when building your mental health strategy.



**Resources** – when setting your objectives think about the resources (time, money, people) you have available and the degree of effort needed.

- For example: what do you need to roll out organization-wide manager training? Will it be online or in person? How long will each session be? How will you track participation, survey participants etc.?



**Policies and processes** – make sure you have policies and processes in place to support your strategy.

- For example: a respectful workplace policy with clear processes for reporting incidents or disrespectful behaviour. For more information and templates for creating human rights protection policies visit the [Canadian human rights commission](#).



**On-going review** – supporting mental health is an ongoing effort. The needs and strategies of your organization will change over time. This means, you'll need a constant review process that continues to evolve with your organization.



**Review frequency** – How often you review your progress depends on what works best for your organization. You may want to start with a monthly review, then move to quarterly reviews and reporting on your progress to stakeholders. An annual review is recommended to report on outcomes and where you are relative to your baseline.

Sources:

Sanofi Canada (2016). [The Sanofi Canada Healthcare Survey](#).

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