

November 2014

Mental health in the workplace

a little training goes a long way



Join **THE CONVERSATION**, brought to you by Sun Life Financial – Group Benefits.

Life's brighter under the sun



Foreword



**Marie-Hélène Pelletier,
MBA, PhD, RPsych**

Director, Workplace Mental Health
Sun Life Financial

Of all the questions that I’m asked by organizations in the course of my work, one of the most common ones related to improving mental health in the workplace is “where do I start?”

This paper goes a long way to addressing that question, by highlighting the elements and benefits of mental health training for managers.

While there are many steps that an organization can take to improve mental health in the workplace, manager training is an affordable, accessible and effective place to start. It can be delivered in a relatively short period of time, customized to an organization’s needs and measured for its effectiveness.

And it *is* effective, in increasing productivity, reducing disability costs and improving the lives of employees.

So read on, and see how mental health training for managers can be a great first step to improving mental health in your organization.

THE CONVERSATION.

At Sun Life, we know that it takes many voices to have a great conversation. That’s why we are working with a wide range of people – inside and outside of Sun Life – to bring the best thinking in Group Benefits to the marketplace. These are subject experts, visionaries and leaders in best practices and innovative ideas – coming together to take benefits to the next level. We will be using our resources, expertise and relationships to facilitate the dialogue. We understand the power of great minds. We want everyone to contribute.

Join **THE CONVERSATION**. Brought to you by Sun Life Financial.

Mental health training for managers is a simple, effective first step to address mental health in the workplace

Think of the times in your life when early action on a small problem could have prevented a much larger one.

That nagging cough that turned into pneumonia, the loose shingle that turned into a hole in your roof, or the unaddressed misunderstanding that ruined a friendship. Life is full of “take action” moments where early intervention on an emerging issue can prevent the issue from occurring.

Mental health in the workplace is no exception. Early intervention can make a big difference to mental health outcomes – and it’s an area worth addressing as the costs are staggering. In recent years, Canadian employers have identified mental health as the leading cause of both short-term and long-term disability claims in their organizations.¹ Of the total economic burden caused by mental illness in Canada—about \$51 billion per year—**\$20 billion stems from workplace losses due to disability claims, absenteeism and lost productivity.**²

Poor mental health has also been linked to physical health problems. A common example is excess stress, which has been shown to contribute to the development of chronic physical illness, with links to high blood pressure, hardening of the arteries, obesity and type II Diabetes³.

The “small action” that can prevent many of these problems from happening is surprisingly simple: **mental health training for managers.** While this training doesn’t intend for managers to treat or solve mental health problems, it does allow them to spot a potential mental health issue early on and can help reduce the chances of it developing into something more serious.



The 2014 Sun Life Canadian Health Index found that one in seven working Canadians reported having missed work in the past month due to a mental health issue.



Understanding mental health

Most of us can feel overwhelmed from time-to-time and these feelings pass after several days or a week – that’s a normal part of life. Concern can arise when signs and symptoms persist, affecting a person’s ability to function day-to-day. This may be a progression toward mental illness.

Mental illness can vary in severity and take many forms, including depression, anxiety disorders, bi-polar disorder and schizophrenia.

The good news is that with the right treatment, symptoms can often be managed effectively, allowing people to resume happy, productive lives.

As with many health issues, early detection and treatment can be key to minimizing the impact on a person’s life and returning them to health.

Did you know?

- 20 per cent of Canadians will experience mental illness in their lifetime.⁴
- Every week, 500,000 Canadians miss a day of work due to mental health reasons.⁵
- Approximately 8% of adults will experience major depression at some time in their lives.⁶
- Anxiety disorders affect 5% of the population, causing mild to severe impairment⁷
- Stigma is a powerful barrier to getting help – 60% of people with a mental health problem or illness won’t seek help for fear of being labeled.⁸

The unique role of managers



Managers are ideally situated to be the first responders in helping employees who are experiencing mental health issues. They interact with employees on a regular basis, are familiar with employees’ job duties and personality, and understand the workplace and the culture of the organization.

The issue is that many managers lack the ability to recognize a mental health issue and steer struggling employees to potential solutions.



Involving managers in the development of the training can improve their buy-in –and the likelihood that it will meet their needs.

Mental health training can help managers do three key things:

- 1 Recognize the potential signs of employee mental health problems
- 2 Address mental health issues within a workplace context
- 3 Provide employees with support and referral to workplace resources

Managers therefore can have an active and very important role to play. However, what managers shouldn't do is step beyond the boundaries of potential detection and support to provide diagnosis or treatment. Managers are not counselors, psychologists, or physicians– nor should they be expected to assume any of those roles.

The benefits of manager training do not stop at helping individual employees. Training managers to be more aware of employees' health and wellbeing, has shown to have an effect on an organization's overall culture leading to improved employee relations, lower stress levels among both managers and employees, and improved workforce engagement.⁹

Effective programs require skilled trainers with:

- Strong knowledge of mental health and mental health problems
- Personal or professional experience with people who have mental health problems
- Good teaching, communication and interpersonal skills
- An understanding of the responsibilities of managers and supervisors
- A good understanding of the organization and its culture, as well as the resources, services, and policies specific to that organization.



What **effective training** looks like

Customization

Customization is one of the keys to the success of mental health awareness training. Training content should be tailored specifically to the mental health issues that are most prevalent in your organization, and should take your company culture and current awareness level of your managers into account.

For example, in many cases, depression and anxiety are the most prevalent mental illnesses among individuals in the working population. In such a case, training content should focus on improving the understanding of anxiety and depression, as well as the warning signs and supports associated with each.

Reducing stigma

Although strides have been made in mental health awareness in recent years, no organization is immune to the stigma that surrounds it. The 2014 Sun Life Canadian Health Index found that only 9% of employed Canadians strongly agree that they would be comfortable disclosing to their employer that they were experiencing emotional or psychological distress. Reducing this stigma is therefore a foundational part of any manager training program.

Research shows three components, that when incorporated in a training program, are very effective at reducing participants' stigma and increasing their comfort when interacting with people with mental health issues.¹⁰

- 1** Meeting individuals with mental health problems or hearing real-life stories of people dealing with mental health issues.
- 2** Demystifying mental illness with factual information, such as the prevalence of different problems, the signs of problem development, and how these problems can be treated.
- 3** Improving participants' interpersonal skills so they are more confident about recognizing, engaging with, and helping someone who is showing signs of a potential mental health problem.



Training structure

The most effective training programs incorporate both lecture-style delivery as well as ‘learning by doing’ methods such as role playing and case studies.

Lecture-style delivery can help provide factual information about mental health and mental health problems, while case studies and practice through role play can help engage participants and help improve confidence and skills.

Role play scenarios help provide trainees with the opportunity to practice their skills, learn from each other, and take different perspectives.

Case studies provide trainees with the opportunity to discuss and evaluate manager behaviours related to employee mental health in a relatively risk-free manner. They do not require managers to analyze their own behaviours or the behaviours of their peers in quite the same way that role play scenarios do – and so allow a degree of separation that facilitates greater critique of actions and behaviours.

Five questions before training begins

Before you develop a workplace training initiative, you’ll want to have answers to the following five questions:

- 1 Who is the target of the training or the initiative?** Leaders and managers only, or should you “raise the bar” on mental health learning for a wider set of employees.
- 2 What are your goals?** These can include short-term goals (improving managers’ knowledge and skills about employee mental health) and longer-term ones (reducing short- and long-term disability related to employee mental health problems).
- 3 How can you best achieve these goals?** What type of training (in person, online) best fits your organization’s size and culture.
- 4 What barriers might exist to achieving your goals?** Identifying and addressing areas of potential risk and resistance in advance (lack of executive support for example) can make the implementation easier, more straightforward, and more likely to succeed long-term.
- 5 How will you measure success?** Establish clear proof points that can determine if your training was successful.

Training outcomes

Although the specifics may vary depending on the organization's characteristics and needs, a successful training program will have the following three fundamental outcomes.

1 Ability to recognize warning signs

Managers will understand that many mental health issues impact an employee's typical behaviour and performance, and will learn to look for classic warning signs. These can include: changes in demeanour or appearance, poor performance, problems interacting with others, poor timekeeping or repeated lateness, or fatigue and poor concentration.

When – Managers should take action after noticing warning signs – in most cases, the sooner the better.

Where – They should talk to the employee in a private, safe environment where the employee can speak openly without fear of others overhearing the conversation

How – They should use open-ended questions and allow employees to answer in their own words. For example:

“What can I do to help?” instead of “Can I help?”

Managers should also ask the employee if they have any suggestions on what might be helpful. Sometimes employees know exactly what would be best for them, but are afraid to ask for it.

What – Managers should be supportive and non-accusatory in all meetings, discussions, or interactions with the employee. They should be clear about confidentiality and any limits on this, and be able to communicate this to the employee. For example, while the manager won't share information with the employee's co-workers or their own co-workers, they may need to share information related to health and safety with someone in Human Resources.

2 Ability to engage with the employee

Managers will increase their comfort with how to engage with an employee who may be experiencing a mental health issue. An employee may worry that revealing a mental health condition to their manager could negatively impact their career. Training increases managers' awareness of how employees may feel, and gives them the skills to address the issue appropriately and respectfully.

3 Ability to direct the employee towards help

Managers will learn about the information, resources and support that the organization can provide – and what may be available in the broader community. Before speaking to an employee, they should have some information on hand so that it that can be easily accessed. The managers should also remind the employee that the organization is there to help them and that accommodations are possible.



Measuring success

Getting a full picture of the impact of your training is not overly complicated. You'll need to choose the metrics you wish to measure and establish baselines by conducting short surveys in advance of the training. See the table below for a number of quantitative and qualitative measures that you can use.

Quantitative measures
Absenteeism
Turnover
Disability duration (both STD and LTD)
Disability frequency (both STD and LTD)
Productivity/performance ratings or outcomes
Insurance and/or disability costs
Qualitative measures
Manager knowledge/awareness
Managers attitudes/stigma
Manager self-efficacy/confidence
Employee morale and satisfaction
Employee commitment



Training in action

“A few weeks after taking mental health awareness training, I noticed that one of my highest achieving employees was acting a bit strangely – not going out for lunch with colleagues, coming in late, and also staying really late. She was normally quite presentable, but she came in one day looking really disheveled. Remembering that one of the “warning signs” of a possible problem is a “deterioration in appearance,” I decided to have a chat with her to see if everything was okay.

We sat down in my office and I reassured her that nothing was wrong but I just wanted to check-in. As soon as these words were out my mouth, her eyes started to well up. Without going into details, she told me about family issues they were having – and that she was having trouble doing routine things like eating and sleeping.

We talked it through. I suggested she call our EAP – and I was able to make some accommodations to ease her requirements at work. She later told me that the EAP people were able to provide “a variety of really practical resources” that she wouldn’t have known about otherwise. She ended up taking a few days off of work but never had to go on disability leave. Between the EAP, the temporary accommodation, and those few days off, she was able to return to normal in a few weeks.

I realize that this may not have been a mental illness, but I also think it could have turned into one. I hate to admit it, but without the training, I might not have taken any action. I am so glad that I did.





Measurable benefits

Researchers at Canada's **Saint Mary's University** (Dimoff/Kelloway 2013) have demonstrated the potential of mental health training for managers. The study involved training 200 managers at two organizations using a customized training program, designed by the researchers, specifically for the workplace. Managers were randomly assigned to a training group and a control group. Relative to their own pre-training scores as well as compared to the control group, managers that received the training showed significant improvements in several key areas:

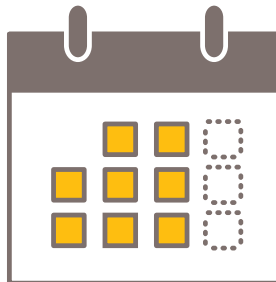
- 1 Greater knowledge of mental health problems
- 2 Self-confidence in their ability to recognize, support and provide appropriate resources to an employee experiencing a mental health problem
- 3 More positive attitudes toward employees with mental health problems
- 4 Greater intention to promote mental health in the workplace

What's more, the training was associated with a substantial impact on mental health related disability claims. One year post training, disability costs related to mental health were 20% lower in the organizations studied, with the duration of mental health related disability claims decreasing by 27%, or up to 19 days per claim.

Mental health training for managers was associated with:



20%
reduction in
mental health
disability
related costs



27%
decrease in mental
health related
disability claims
duration

Source: Dimoff/Kelloway, Saint Mary's University, 2013

Take action on workplace mental health

Early intervention on mental health issues in the workplace can reduce disability costs, increase productivity, and improve the lives of your employees. And mental health training for managers is an affordable and effective first step to making this happen.

Talk to your insurance carrier or a licensed group benefits advisor to learn more about the training options available to your organization.





About Sun Life

A market leader in group benefits, Sun Life Financial serves more than 1 in 6 Canadians, in over 12,000 corporate, association, affinity and creditor groups across Canada.

Our core values – integrity, service excellence, customer focus and building value – are at the heart of who we are and how we do business.

Sun Life Financial and its partners have operations in 22 key markets worldwide including Canada, the United States, the United Kingdom, Hong Kong, the Philippines, Japan, Indonesia, India, China and Bermuda.

1 Towers Watson, 2009/2010 Staying@Work Report

2 Mental Health Commission of Canada, Making the Case for Investing in Mental Health in Canada, 2013

3 Harvard Mental Health Letter, Harvard Medical School, March 2011

4 Mental Health Commission of Canada

5 ibid

6 Canadian Mental Health Association

7 ibid

8 ibid

9 DeLange, Taris, Kompier, Houtman, & Bongers, 2004, and Israel, B., Baker, E., Goldenhar, L., Heaney, C., & Schurman, S. (1996). Occupational stress, safety, and health: Conceptual framework and principles for effective prevention interventions. *Journal of Occupational Health Psychology*, 1, 261-286.

10 Corrigan and Watson, 2005

Life's brighter under the sun

Group Benefits are offered by Sun Life Assurance Company of Canada, a member of the Sun Life Financial group of companies.

GB10173-E 11-14 jb-ny

