

Building Block 3:

PLANNING



Learning Objectives

- ❑ **Frame** – A plan to promote psychological health and safety
- ❑ **Clarify** – The approach to making a plan
- ❑ **Identify** – The level of commitment to adapt or adopt the National Standard



Goal: Design an implementation plan that meets employer and employee needs and objectives

Psychological Safety: A ROADMAP

GETTING STARTED

- Foundation
- Support
- Planning

GAINING MOMENTUM

- Leadership
- Culture
- Connections
- Prevention

RAISING THE BAR

- Excellence



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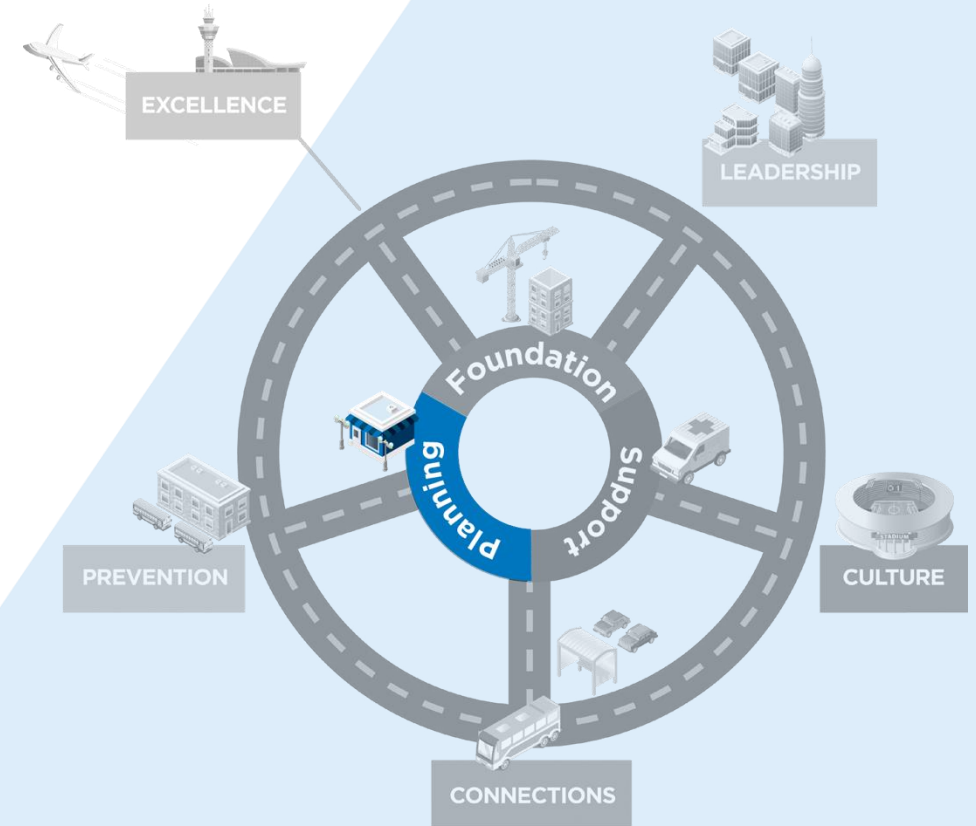
Planning

Purpose of the **Roadmap Planning Building Block 3** is to:

- Frame an intentional strategy for reducing mental harm and promoting mental health.
- Determine which option best aligns to the organization's capacity, needs and budget.

Each building block leverages the Plan – Do – Check – Act cycle to gain familiarity with the management system approach.

The following slides will assist in making decisions and plans to facilitate a program that fits your organization's need to prevent mental harm and promote mental health.



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PDCA Cycle

P

Plan – Determine what you will do and how you will go about doing it.

D

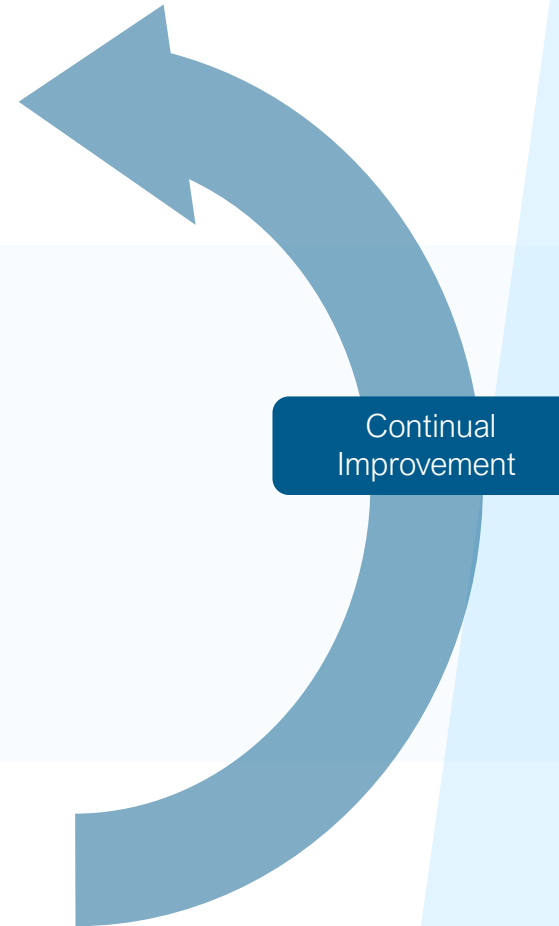
Do – Implement what was planned.

C

Check – Assess performance relative to the plan.

A

Act – Take appropriate action to correct and improve.



Setting the Stage

Planning provides a documented framework that sets objectives, involvement of key stakeholders, goals, metrics, programs, policies, initiatives, in a structured format that provides the opportunity to measure impact.

Regardless of the approach used to create a plan, no plan will have impact unless there is leadership AND employee involvement, buy-in, and participation.

It's critical for all planning, regardless of the option, to consider accountability, evaluation, and sustainability.



Pre-Frame

 Building Blocks #1 and #2 cover important information that helps to determine the organization's current level of commitment, readiness for change, and ability to implement a mental health strategy.

These are key questions to answer before proceeding with Building Block #3.

- What is your organizational capacity?
- What is your budget?
- What support resources do you have available?
- Do you have an inventory of workplace mental health (WMH) related policies, programs & initiatives?



Three Levels of Mental Health Strategies

Level 1: Awareness

Create a plan with a 12-month horizon, consciously aligned or not to the Standard, and focused on prevention and/or reaction strategies.



Level 2: Strategy

Develop a structured mental health strategy that addresses organizational needs and involves key stakeholders (e.g. mental health committee).



Level 3: PHSMS

Integrate the mental health strategy to be intentionally influenced by the CSA National Standard on Psychological Health and Safety in the Workplace.



Level 1: Awareness 12-month Approach



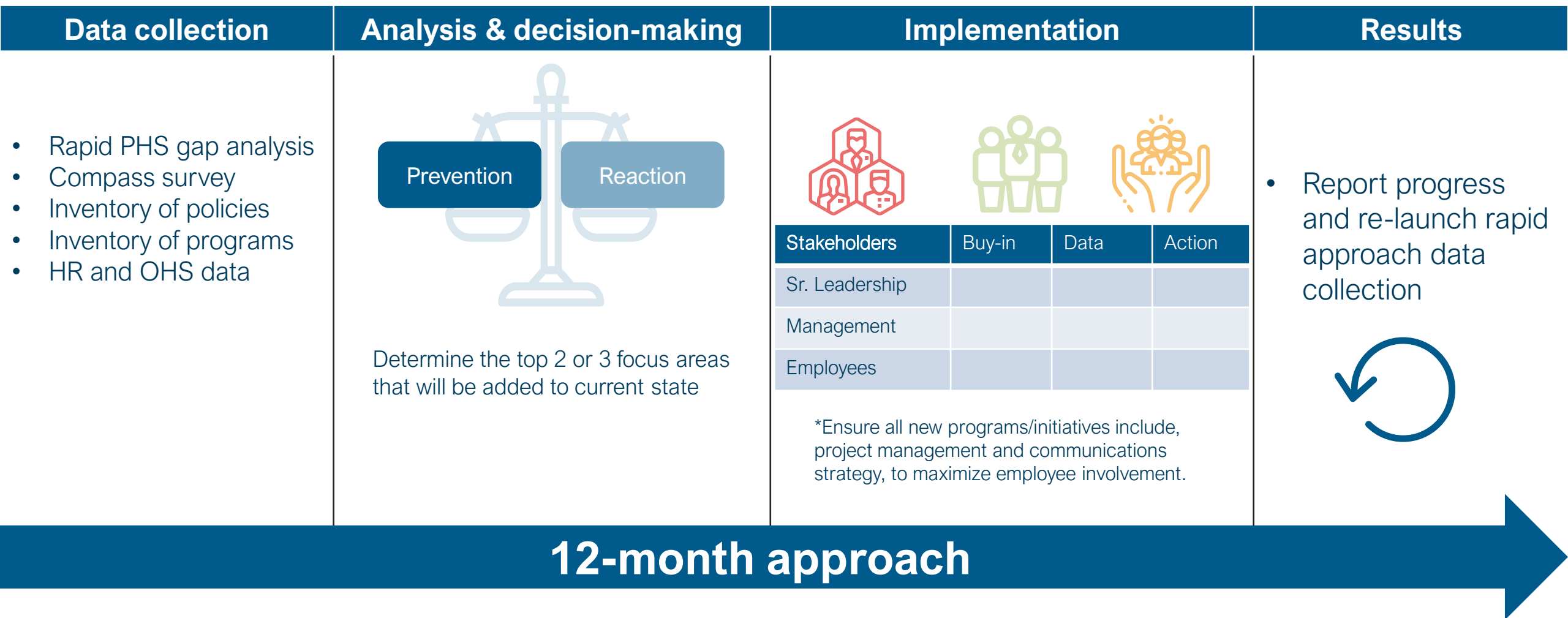
Purpose of Level #1

To create an agile 12-month plan, with the purpose of moving the organization with intention towards creating a psychologically healthy and safe workplace.



*"A fearless organization is one that provides psychological safety."
- Amy Edmondson, Harvard Business School Professor*

Overview of Awareness Approach



Level 2: Strategic Implementation

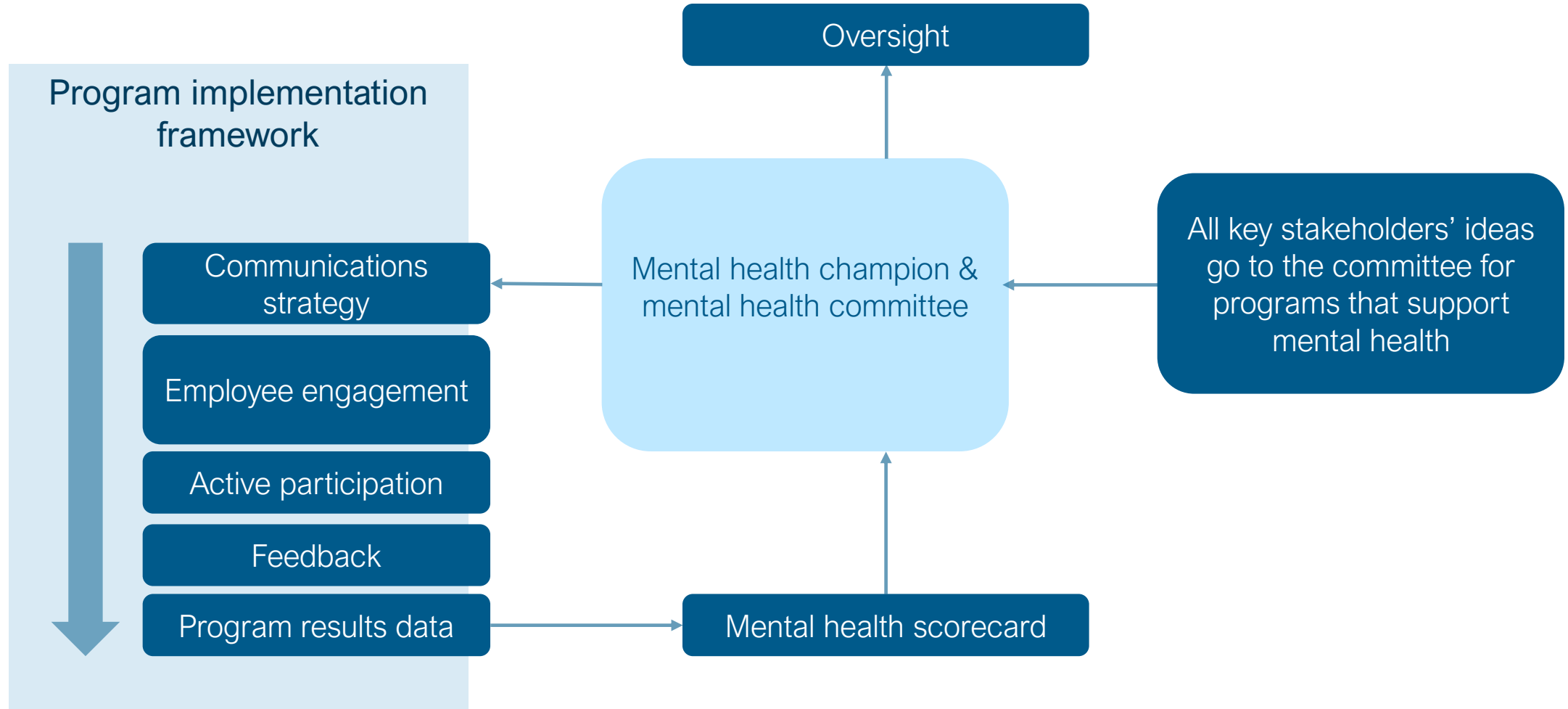


Purpose of Level #2

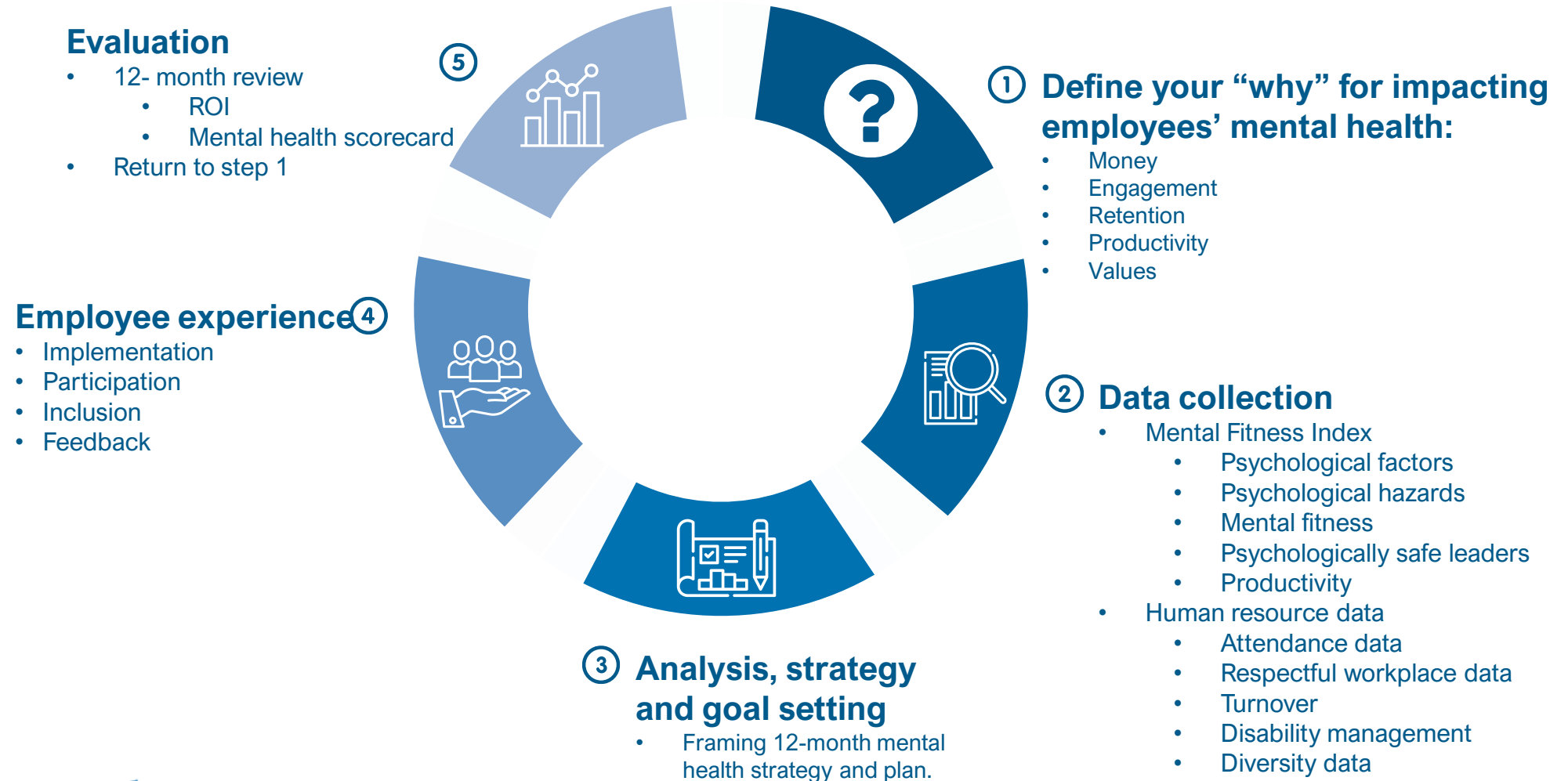
To develop a mental health strategy that addresses organizational needs & involves all key stakeholders.



Mental Health Committee in Action



Strategy Framework



Step 1 - Vision

Framing 12-month mental health strategy and plan



In one line, what should your mental health strategy accomplish?

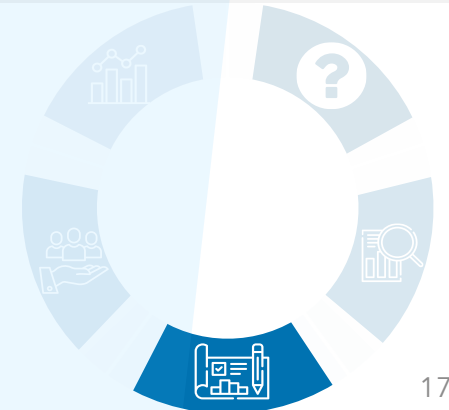


Step 2 - Purpose

Framing 12-month mental health strategy and plan



Define how this mental health strategy will positively affect your organization, and what results you are looking to achieve.



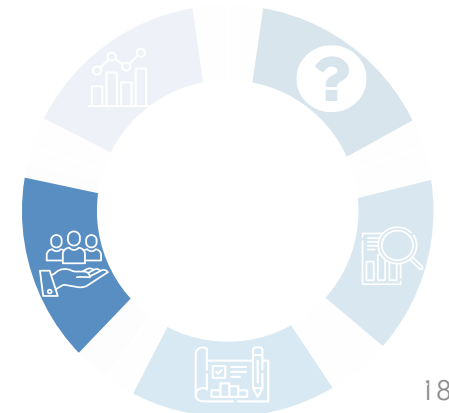
Step 3 - Guiding Principles

Framing 12-month mental health strategy and plan



What are some key principles that will guide the development?

- Influence a culture shift
- Ensure two-way accountability
- Establish an evidence-based approach
- Build a psychologically safe workplace
- Increase focus on prevention
- Frame goals and objectives that initiate mental fitness
- Identify support to help employees engage in mental fitness
- Ensure integration into the organizational strategy



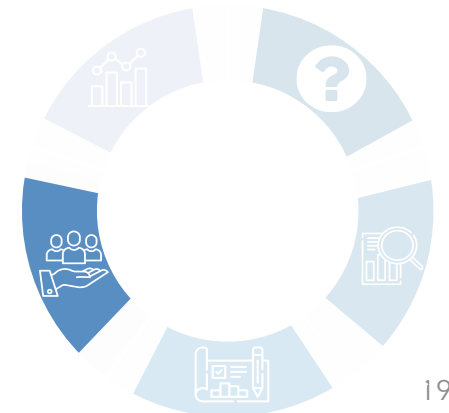
Step 4 - Influencing Factors

Framing 12-month mental health strategy and plan



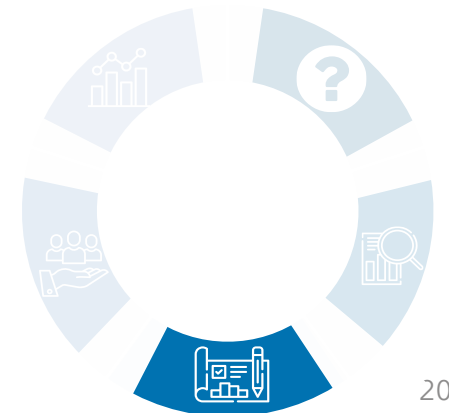
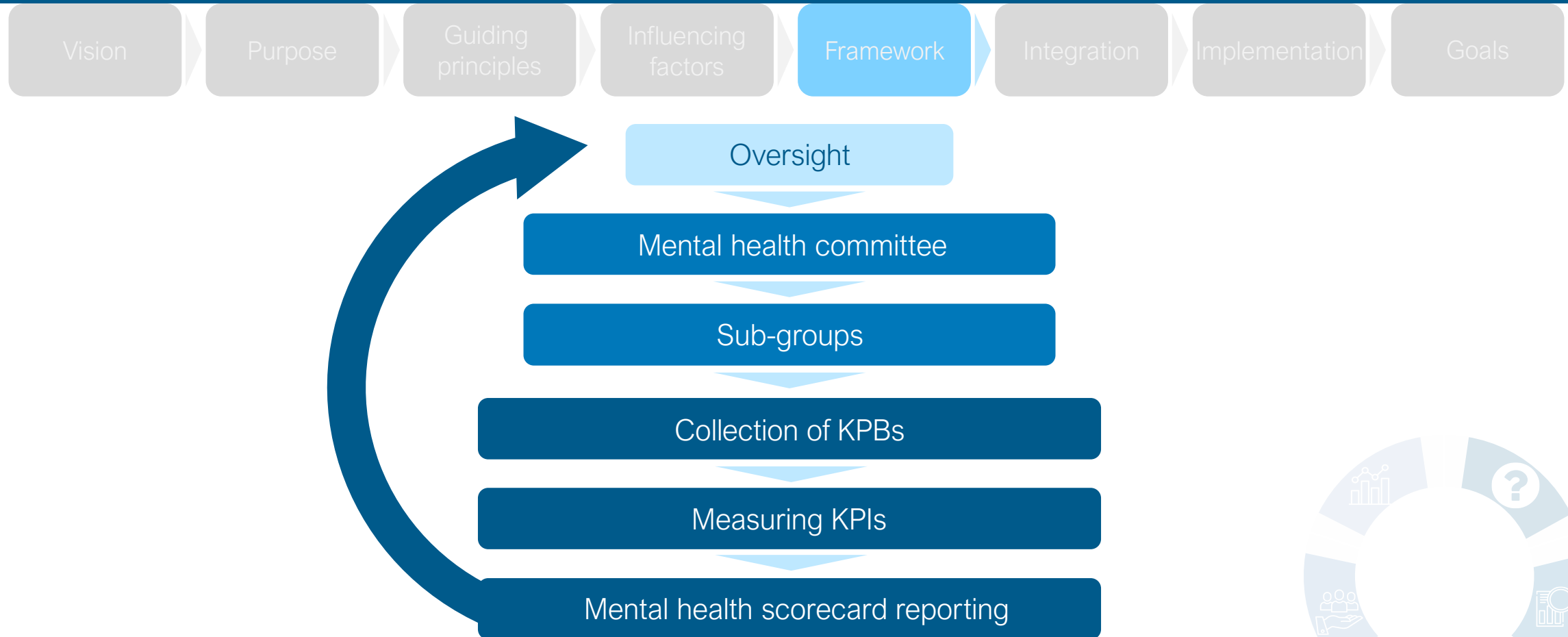
 Consider current programs, policies, laws, and regulations that influence the development of this mental health strategy.

- Respectful workplace policies
- EFAP
- Attendance management
- Health and safety
- Provincial OHS regulations
- Canadian human rights
- Ethics policies
- Diversity and inclusivity policies



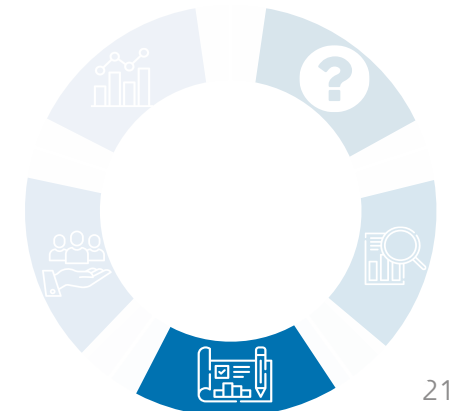
Step 5 - Mental Health Committee Operations

Framing 12-month mental health strategy and plan



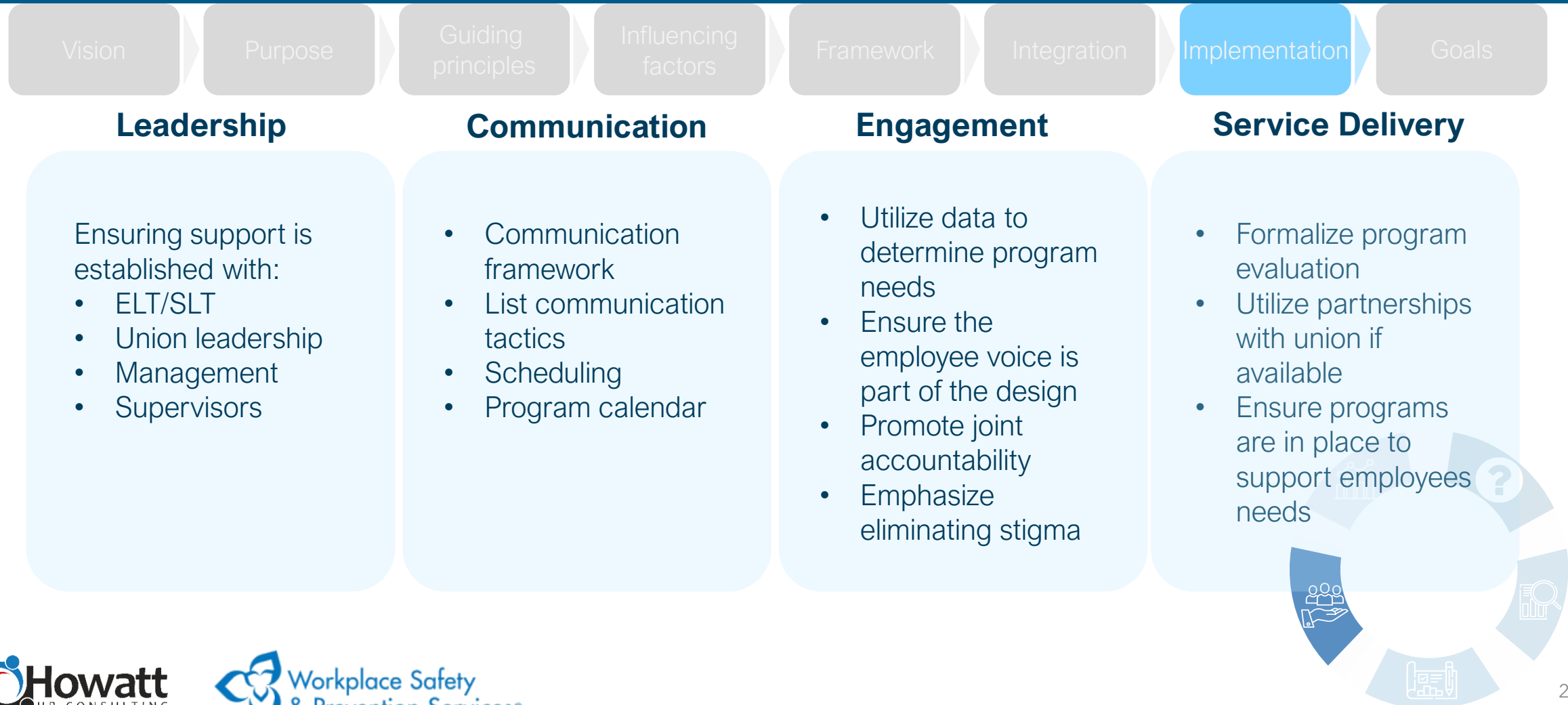
Step 6 - Integration

Framing 12-month mental health strategy and plan



Step 7 - Implementation

Framing 12-month mental health strategy and plan

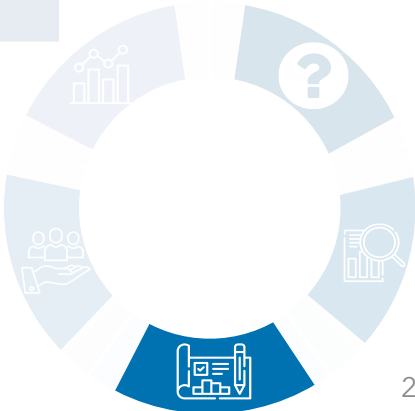


Step 8 - Goals

Framing 12-month mental health strategy and plan



Goals	Objectives
Goal 1 – Promote two-way accountability.	Engage the employee in a mental fitness culture and the importance of understanding, engaging and living the values promoted through this strategy.



Accountability

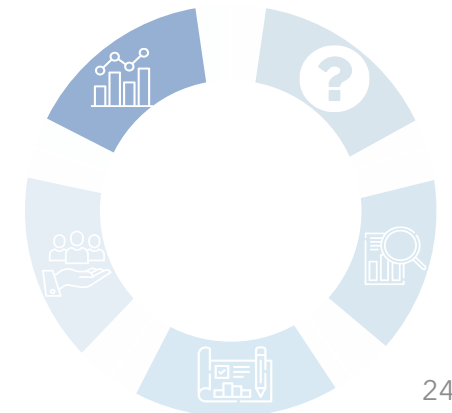
Measurement

Scorecard

Reporting

- ▶ Define your Key Performance Behaviours (KPBs) / Key Performance Indicators (KPIs), Targeted Outcomes

Factors	Examples
KPBs	• Mental Fitness score • Psychologically safe leader's score • Confront incivility • Participation rates
KPIs	• Attendance rates • LTD/STD/ WCB/Near misses • Number of chronic issues per FTE • Percent of population come to work feeling unwell per week
Results	• Schedule attainment • EBDIT (Earnings Before Debt, Interest, Taxes) per FTE • Safety violations and accidents (loss time days) & WCB rate • Turnover • Healthcare costs as percent of revenue • Re-engagement of workforce



Accountability

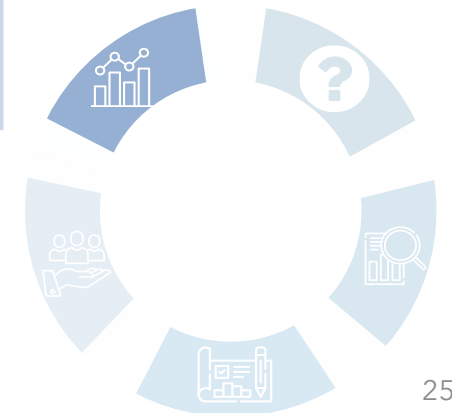
Measurement

Scorecard

Reporting

- ▶ Establish the metrics that will be reported to leadership that will be used to evaluate the mental health strategy's impact

Targeted key performance behaviours	Targeted key performance indicators	Desired results
Example: • Self-advocating in a psychologically safe manner (assertive vs. aggressive).	Example: • Decrease in the reported frequency of incivility year over year in the Mental Fitness Index.	Example: • Tangible: Shows in the attendance data as an improvement. • Intangible: Cultural employees are reporting a more positive climate.



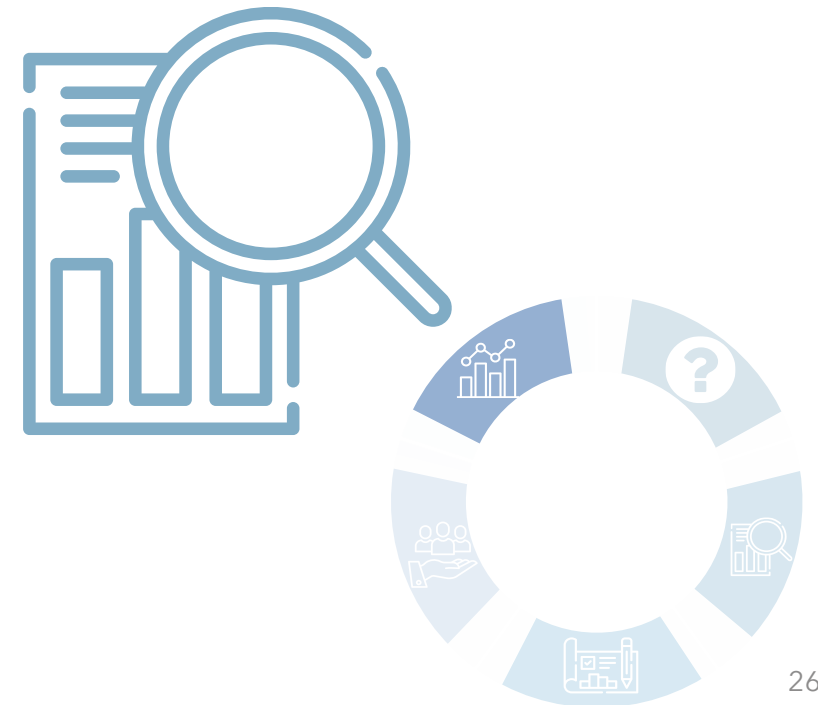
Accountability

Measurement

Scorecard

Reporting

- ▶ Frequency (e.g., monthly, quarterly, annually)
- ▶ The format (informal/formal, presentations or reports)
- ▶ Supporting materials required for reporting above and beyond the scorecard (budget, committee summary, participation levels, good news stories, etc.)



Level 3: Management System



Purpose of Level #3

To ensure that the current mental health strategy is intentionally aligned to the National Standard for Psychological Health and Safety in the Workplace.



Reference Building Block #8



This section will briefly introduce some of the Standard considerations. For more detail, refer to Building Block #8, to ensure you are on track to adopting the National Standard.

Ensure you are incorporating the psychological health and safety management system PDCA considerations, such as:

- Conformity
- Full gap analysis
- Incident reporting
- Internal audit, preventive measures
- Corrective action
- Management review



Key Components of the National Standard

- Strives to have organizations build a PHS Management System so that the organization can identify hazards that can contribute to psychological harm, just like you would for an OHS strategy.
- The PHS Management System has 3 main goals:
 - 1) Prevention of psychological harm
 - 2) Promotion of mental health
 - 3) Resolution of incidents or concerns
- Requires commitment to a PDCA approach
to ensure you are on track and continually re-checking and re-aligning your goals

Are you
adapting or
adopting the
National
Standard?

The PHS Management System (PHSMS)

**Commitment
Leadership
Participation**

1

- Confirmed intent
- Expectations

Planning

2

- Data collection
- Risk assessment
- Project plan
- Change management

Implementation

3

- PHS committee actions
- Education, awareness and communication
- Critical event preparedness (individual and organization)
- Reporting and investigations

**Evaluation and
Corrective Action**

4

- Monitoring and measurement
- Internal audit
- Preventive and corrective action

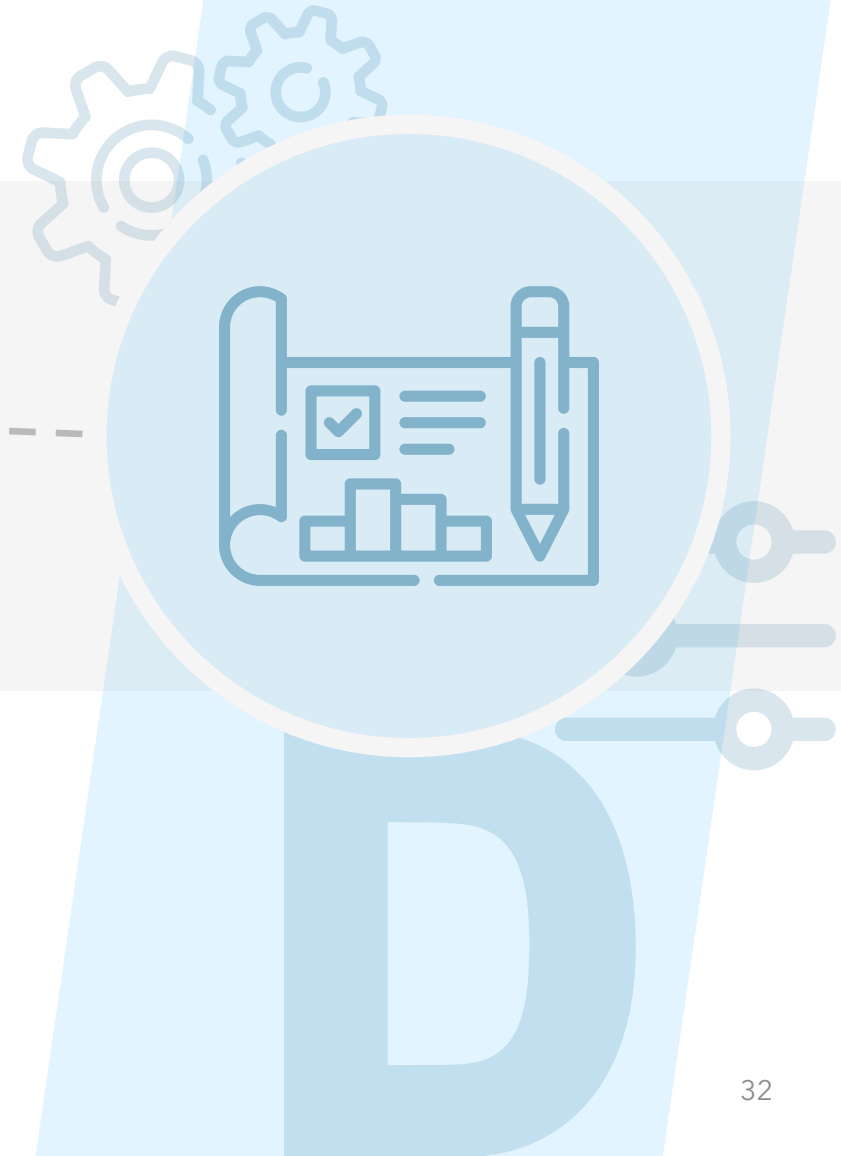
**Management Review,
Continual Improvement**

5

- Review process
- Performance evaluation
- Opportunities for improvement

Implement

Action steps to consider	How will each element be implemented?
Project management	
Communication plan	
Scheduling	
Facilitation strategy	
Employee feedback strategy	
Change management	
Training plan	



Monitor

Define success metrics, for example:	Be specific
Desired key performance behaviours (KPBs)	
Target key performance indicator (KPI) results	
Desired outcomes/results	
What data will be collected/available (e.g. qualitative or quantitative data)?	
What reporting will be completed?	

Correct and Improve

- Have we met our targets or goals?
- Do we need to make any adjustments?
- Where are our opportunities for continual improvement?

PDCA Cycle

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Howatt HR Resources

[Rapid psychological health & safety gap analysis](#)

A fast and efficient way to get a stronger reading on your current psychological safety programming

[Making the Business Case for Mental Health in the Workplace](#)

This article showcases how to simply and efficiently present the information when forming a business case

[Employee experience scorecard online tool](#)

This calculator estimates the cost of employee workplace mental health concerns and then compares them to the investment in programs and policies



Mental Fitness Index Dashboard Report



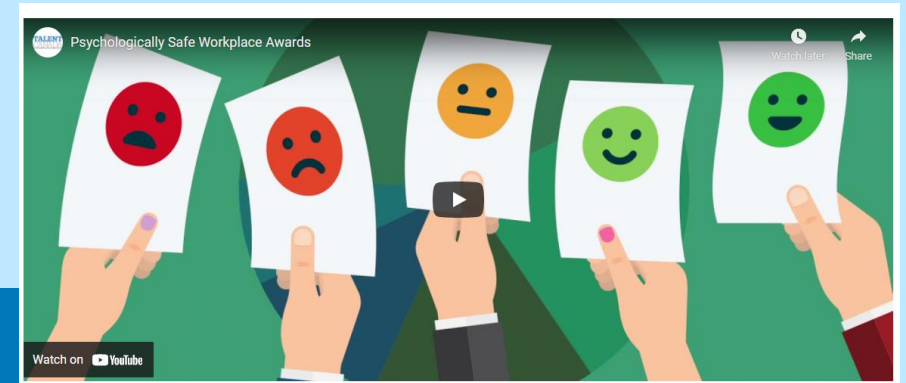
What it is:

- Provides you with aggregate dashboard of your organizations overall charge score
- Identifies psychological health and safety gaps to inform strategic decision-making
- Promotes two-way accountability and establishes employee and organizational health baseline measures.
- May be eligible to receive Psychologically Safe Workplace award distinction

What you get:

- Aggregate dashboard report for the organizations including scores pertaining to program participation and impact, psychological health and safety, mental fitness and employee experience
- Each employee receives an individualized report and resources to improve their mental fitness

Go to the website to watch the video and learn more:
<https://www.psychologicallysafeworkplace.com/faq/>



Psychologically Safe Workplace Award: MFI Fee guide

Less than 100 employees	\$499 + tax
100-500 employees	\$799 + tax
More than 500 employees	\$999 + tax

WSPS Resources

- [Organizational Readiness Tool](#)
- Roadmap Jump Start Guide
- Sample Action Plans from Think Mental Health.ca
 - [Getting Started](#)
 - [Gaining Momentum](#)
 - [Raising the Bar](#)
- [WSPS Gap Analysis Tool](#)
- For consulting support services, please contact WSPS at



It is recommended that the organization have its own copy of the National Standard (free download available from [CSA Group](#)).

Maximize your Roadmap experience



For consulting support services, please contact:



roadmap@wsps.ca

Building Block 4: **LEADERSHIP**



For all your health and safety solutions, contact:

Workplace Safety & Prevention Services

1 877 494 WSPS (9777)

[WSPS.CA](https://www.wsp.ca)

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