



PRACTICAL CONSIDERATIONS FOR FACILITATING

WORKPLACE PSYCHOLOGICAL HEALTH AND SAFETY

DR. BILL HOWATT

Preface

I was introduced to the concept of psychological health and safety four years ago. We'd just marked the first anniversary of the COVID-19 pandemic, my province was heading into another shutdown, and I was grieving my father, who'd recently died of cancer. I knew I'd need a significant project to ride out another shutdown alone, so I searched for an online course to immerse myself in.

When I discovered the Certificate in Psychologically Safe Leadership, taught by Dr. Bill Howatt via the University of New Brunswick, I knew I'd found my project. The subject seemed interesting, and I was confident I'd learn new skills to support my colleagues throughout my career.

Thanks to Dr. Howatt's teaching, my pandemic project became a passion. After completing the coursework, I continued to read up on psychological health and safety, workplace mental health, and cultivating organizational cultures where employees can thrive.

Fast-forward four years and two jobs. These days, I have the privilege of working with Dr. Howatt to educate employers, leaders, and workers about psychological health and safety in the workplace.

In this e-book, you'll find a collection of Dr. Howatt's insights to establish the foundation for a psychological health and safety program and advice to facilitate psychological health and safety in your workplace. I hope you'll save a copy, mark it up with notes, and turn to it as a resource for many years to come.

Brandi Cowen, Editor, OHS Canada and Talent Canada



Foreword

The significance of psychological health and safety has become paramount in a world increasingly attuned to the intricacies of workplace dynamics. This e-book, authored by Dr. Bill Howatt, a recognized international expert in psychological health and safety, is a compelling guide for organizations committed to fostering environments where mental well-being and psychological safety are more than just mandates—they are the cornerstones of success.

As we navigate the challenges of modern workplaces, the statistics are undeniable: One in five workers grapples with mental health issues, a figure exacerbated by global crises like the COVID-19 pandemic. Psychological health and safety is not merely a regulatory expectation, but also a critical framework for cultivating thriving environments for workers.

THE IMPERATIVE OF PSYCHOLOGICAL SAFETY

Taking care of workers' psychological health at work has many benefits. First, psychological safety directly influences productivity and innovation. When workers feel safe, they are likely to contribute new ideas and engage meaningfully with their work, leading to heightened or ganizational efficiencies and creative breakthroughs. By proactively addressing psychological health and safety concerns, organizations can significantly reduce risks associated with absenteeism, turnover, and disability claims, which translate to substantial financial savings.

Beyond economic benefits, adhering to psychological health and safety standards fulfills ethical and legal obligations, reflecting a deep commitment to employee welfare. These practices underscore an organization's integrity and responsibility, fostering a culture of trust and respect that resonates throughout its workforce.

STRATEGIC IMPLEMENTATION OF SUSTAINABLE OUTCOMES

Drawing from Dr. Howatt's extensive research and leadership experience, this e-book describes structured methodologies like the Plan-Do Check-Act cycle. It empowers organizations to identify psychosocial risks, engage in meaningful interventions, and cultivate skilled teams capable of sustaining mental health initiatives. Moreover, data-driven

decisions become central in tailoring initiatives that meet specific organizational needs, ensuring accurate outcomes measurement and continuous improvement.

A CULTURE OF INCLUSIVITY AND RESILIENCE

Creating psychologically safe workplaces begins with leadership and culture transformation. This involves implementing programs and ingraining psychological safety into organizational values and daily interactions. Such transformation promotes inclusivity and accountability and helps to build resilience in the workforce that helps prepare them to face challenges collectively and collaboratively.

Leaders are encouraged to foster environments where dialogue is open, trust is fundamental, and every team member feels valued for their contributions. This e-book provides tools and strategies for leaders to develop these attributes, establishing a culture where mental health is a central tenet of the workplace ethos.

As you engage with the insights offered within these pages, embrace the opportunity to champion mental well-being and psychological safety within your professional domains. Doing so will enhance your employees' quality of life and propel your organization toward a future marked by resilience, innovation and sustainable success.

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Section 1

Establishing Strong Foundations for Psychological Health and Safety

This compilation of articles provides insights to consider before implementing psychological health and safety (PHS) in the workplace. It highlights psychological safety's critical role in fostering mental well-being and preventing mental harm.

In today's work environment, the significance of psychological health and safety cannot be understated, given its direct impact on workforce well-being and organizational success. Understanding and promoting psychological safety involves comprehensive strategies to protect employees from mental harm while fostering a culture encouraging mental well-being and open communication.

WHY FOCUS ON PSYCHOLOGICAL HEALTH AND SAFETY

- **Increased mental health concerns:** The prevalence of mental health issues, exacerbated by global challenges such as the pandemic, financial instability, and social pressures, highlights the urgent need for workplaces to address these concerns actively.
- **Impact on productivity and innovation:** Employees in psychologically safe environments are more likely to be productive, creative and engaged. This boosts individual performance and enhances organizational efficiency and innovation.
- **Risk mitigation:** Proactively addressing mental health reduces absenteeism, turnover and disability claims, ultimately leading to signifi-

cant cost savings and risk mitigation for organizations. A failure to prioritize these aspects can result in increased workplace injuries and mental health claims, substantially affecting the bottom line.

- **Regulatory and ethical obligations:** Many regions mandate organizations to create healthy and safe workplaces, including managing psychosocial hazards. Adhering to these regulations fulfills legal obligations and reflects a moral commitment to employees' welfare.

HOW EFFECTIVE IMPLEMENTATION OF PSYCHOLOGICAL HEALTH AND SAFETY CAN BENEFIT EMPLOYERS

Reading and implementing the comprehensive strategies for psychological health and safety provides several key insights and benefits:

- **Structured approach:** Organizations can systematically identify and address psychosocial risks by adopting a structured framework such as the Plan-Do-Check-Act cycle. This systematic approach ensures continuous improvement and long-term sustainability of mental health initiatives.
- **Leadership and culture transformation:** Committed leadership is at the heart of creating psychologically safe environments. These insights guide leaders in fostering open dialogues, establishing trust and developing policies that support mental health. Transforming culture from the top down encourages behav-

hours that promote inclusivity and accountability.

- **Skilled implementation:** The content emphasizes building competencies within teams to support mental health. Organizations can equip employees and leaders with the skills to implement effective mental health strategies and adapt to evolving workplace dynamics through training and development.
- **Data-driven decisions:** Utilizing data to assess workplace mental health risks and opportunities allows for informed decision-making. These insights help craft initiatives tailored to the organization's unique needs and accurately measure interventions' impacts.
- **Practical tools and strategies:** The readings provide practical tools and strategies, such as conducting critical event reviews and leveraging the hierarchy of controls for psychosocial hazards. These tools empower organizations to manage workplace mental health and safety challenges proactively.

Utilizing data to assess workplace mental health risks and opportunities allows for informed decision-making.

BENEFITS OF IMPLEMENTING EFFECTIVE PSYCHOLOGICAL HEALTH AND SAFETY PROGRAM/INITIATIVES

- **Enhanced well-being and performance:** Investing in psychological health and safety boosts employee morale, reduces stress and enhances overall well-being, leading to improved performance and productivity.
- **Reduced costs and risks:** Effective management of psychological health and safety reduces the risks associated with mental health issues, including absenteeism and turnover, thereby saving costs related to healthcare and lost productivity.
- **Strengthened organizational culture:** Creating a psychologically safe environment fosters a culture of trust and respect, enhancing organizational reputation and employee retention and attracting top talent.

By focusing on psychological health and safety, organizations fulfill ethical and legal responsibilities and pave the way for a thriving, resilient, high-performing workforce.



Are you committed to psychological safety?

Mental health is not a new issue. Before COVID, one in five workers reported to work every day with a mental health concern, and the World Health Organization ([WHO](#)) identified depression as the leading cause of disability worldwide.

COVID helped bring this issue to the fore but also exacerbated it. More workers experience symptoms of anxiety and depression, and short- and long-term disability claims due to mental illness have increased. Factor in financial instability, global political challenges and food insecurity, and it's clear the upward trend in cases and claims isn't likely to change in the foreseeable future.

Despite these realities, some CEOs and senior leaders aren't committed to creating a psychologically safe workplace.

LEADERS' COMMITMENT IS THE KEY TO SUCCESS

Promoting mental health and preventing mental harm doesn't require leaders to be experts; they just must be champions. The onus is on leaders to make it a priority and encourage their teams to do the same.

When employees trust that they are supported, they are better equipped to deal with life's challenges and stressors inside and outside the workplace.

Mitigating mental health risks requires the same constant attention given to preventing physical harm. And, just like physical health and safety, there is no endpoint. The focus should be establishing programs, procedures, and policies that make sense for your business, measuring impact, gathering employee input and feedback, and continuously improving to enhance results.

Open dialogue is an essential first step. On top of providing insight into the effectiveness of existing programs (if you have them), open, authentic conversations help reduce stigma and build trust.

The following are additional steps senior leaders can take to demonstrate commitment:

1. Build competency

Ask team members how confident and competent they feel about supporting workplace mental health. Do they know how to create workplace mental health strategies, evaluate program and policy effectiveness and analyze data and trends?

If they don't, you can help them.

Like all professional disciplines, OHS and HR continue to evolve, and professionals can obtain and update credentials to demonstrate and maintain competency. There are no formal credentials for managing psychological health and safety. However, the CSA Z1003 Psychological Health

Check out the WSPS Mental Health Roadmap microsite:

MentalHealthRoadmap.wsps.ca

and Safety Standard was designed to bridge this gap. In 2020, The Conference Board of Canada, in collaboration with Workplace Safety & Prevention Services and Howatt HR, developed the Mental Harm Prevention Roadmap, based on this Standard, to [help facilitators address key building blocks of mental health in the workplace](#).

2. Protect workers with the right policies and programs

Respectful workplace policies and training can mitigate mental harm and violence.

Work-from-home or hybrid work policies can assist employees in blending the demands of work and home.

Psychologically safe leadership and mental fitness training can go a long way toward promoting mental health.

Employee and family assistance programs can support workers in crisis and provide employees and their families with access to professional mental health practitioners.

3. Remember, sometimes less is more

Avoid measuring success by the number of workplace programs, policies and activities. Having these things in place doesn't necessarily mean they are helpful or valued by employees, and they won't produce results if they're not understood or used.

The CSA Z1003 Psychological Health and Safety Standard is based on a Plan-Do-Check-Act approach. A recent study by CSA noted the importance of employers keeping a keen eye on the "check" portion of the framework.

Check that employees know what is available, how to access resources, and that the programs and resources on offer provide value. Consider dropping those that aren't producing the desired results.

4. Pay attention to leading and lagging indicators

Like OHS programs, mental health initiatives should be measured by leading and lagging indicators. Turnover and absenteeism are examples of lagging indicators. Behaviours and attitudes are examples of leading indicators. Build key performance behaviours (KPBs) for the whole organization, particularly leaders, that promote trust and inspire employees and then collect the necessary behavioural data to assess impact.

It doesn't matter whether you are leading a small business or a multi-national organization; businesses of all types and sizes benefit from preventing mental harm and promoting mental health. Psychologically safe cultures drive out fear and silence. They promote accountability and learning and are inclusive and welcoming.

Your words and actions matter; you can only create a psychologically safe culture if you are genuinely committed and act as your organization's primary champion.

Where do you stand? On a scale of one (low) to 10 (high), how committed is your organization to addressing workplace mental health risks and opportunities?

If your score is 8-10, congratulations! You have attained a high level of commitment in your workplace. The key will be continuously reaffirming your commitment and encouraging your team to do the same. [Read this post for tips on sustaining commitment and results.](#)

If you fell in the 5-8 range, you're on your way. Consistency will be critical as you continue to progress. [Read this post on mitigating mental health risk and promoting mental health.](#)

If your score was 1-4, that's okay. It's never too late to commit to mental health. Read on for tips, and [check out this blog post on leadership behaviours](#) that support mental health to help you get started.

Navigating psychological well-being: Lessons from fish tank maintenance

Investing money in psychological health and safety can have a dramatic, positive impact on protecting workers from mental harm and promoting mental health. Employers who want to ensure psychological health and safety is being done correctly can learn what needs to be done through the lens of fish tank maintenance.

Whether you have ever owned a fish tank, consider the following challenge and respond accordingly. You come home to find all your fish dead and your tank water green. Do you remove the dead fish and put new fish in, or clean the tank, check the water, clean the filter, and add new fish? The right choice is the second option.

The key to a good fish tank experience is a clean tank and healthy fish. The water should be tested, the tank cleaned regularly, and fish nutrition managed.

If you understand the fish tank example, you can understand what must be done to reduce mental harm and promote mental health and that the environment matters. Regarding psychological health and safety, psychosocial factors can be positive chargers or negative drains for a workforce.

A workplace mental health program's success requires improving the environment and allowing workers to learn and acquire skills and support to promote their mental health.

AVOID THE BIG PSYCHOLOGICAL HEALTH AND SAFETY MISS

Confusing activity with impact is the big miss that happens too often in workplace mental health ini-

tiatives. For example, sending workers to resiliency training to cope with stress seldom helps if their stress increases and sick time and disability costs rise.

Why? The training is often one-and-done and does not provide a pathway for learning and accountability, such as emotional regulation to create habits that increase workers' ability to cope with stress. This initiative does nothing to get to the root cause.

Employers must understand that programs do not create habits. Programs provide information and opportunity. Too many workplaces' approaches to mental health are to buy programs, hoping they will mysteriously create a thriving workplace. Though many programs are helpful, without a planned, integrated approach that considers the environment and individuals, the desired habits, results, and impact seldom result.

HOW TO CREATE A PSYCHOLOGICALLY SAFE WORKPLACE

Creating a psychologically safe workplace begins with understanding the goal is to create more positive than negative emotions. The more time a workforce enjoys positive emotions, the more likely they will flourish. This also creates more opportunities for the organization to maximize its potential and mitigate risks and costs associated with workplace mental health issues such as STD, LTD, and WCB claims, turnover, and sick time.

The following three steps are akin to an approach often used for fish tank maintenance:

1. **Discover**—Get the data about how workers are doing regarding workplace experience; avoid guessing. Data can be collected through qualitative surveys, interviews, and focus groups. The goal is to understand what psychosocial factors are charging and draining the employee experience. For example, if work demand is perceived as appropriate and fair, it brings purpose to workers as a charge that promotes positive emotions. When work feels overwhelming, confusing, and stressful, it is a drain that creates negative emotions. The discovery must be made through an inclusive lens, factoring in differences and assuming that not all workers have the same experiences. ISO 4503 provides guidance on the psychosocial factors that can positively or negatively impact the employee experience. The discovery process must consider how current programs and policies are perceived and their value.

2. **Design and Direction**—Determine what factors can be improved and what key performance indicators would be enhanced. The design should leverage the fish tank scenario.

A workplace redesign would examine how work is organized and prioritized, how much time workers spend doing ad hoc versus core work, and streamlining and removing useless meetings and emails.

When dealing with issues like work demand, the solution with the most impact will facilitate two-way accountability. For example, a workplace redesign would examine how work is organized and prioritized, how much time workers spend doing ad hoc versus core work, and streamlining and removing useless meetings and emails. Provide training on be-

ing psychologically safe leaders that allow workers to share their concerns without fear, and offer workers resiliency training to cope better with stress and self-advocate. Ensure the focus is on creating new habits. Information is useless if it does not lead to habits that achieve the desired KPIs.

3. **Determination**—Measure the initiatives' success by engaging employees in an evaluation process to check in on their experience. Adopt a

plan-do-check-act approach to

ensure workers develop the habits that maximize the opportunity to protect and promote mental health. There are no shortcuts. Psychological health and safety requires constant vigilance, attention, focus, and maintenance to prevent habits that do not promote positive emotions.

Leveraging the hierarchy of controls for psychosocial hazards

The hierarchy of controls is a fundamental concept in any health and safety program. Many legislative jurisdictions in Canada require employers to consider the hierarchy when determining how to meet the general duty clause of providing a healthy and safe workplace.

However, applying health and safety practices has generally outpaced regulations and guidance from regulators. Many OHS and HR professionals are confused about using the hierarchy, initially developed for physical hazards, to the new expectation of protecting workers from psychosocial hazards that can harm their mental health.

HIERARCHY OF CONTROLS

The hierarchy of controls describes a process or guide employers should consider when responding to work-related hazards. The goal is to apply the controls that provide the most significant level of protection first rather than jumping to less effective (and often less costly) control measures.

Once a hazard has been identified as a workplace issue, the hierarchy guides an organization to explore ways to remove it. Removing a hazard means that a worker cannot be hurt by it. When the hazard cannot be removed, it must be controlled so that workers will not be exposed and injured.

CONTROLS OPTIONS

- Engineering control means reducing exposure to the hazard by modifying the workplace's physical structure, equipment, or processes. Physical barriers and guards are often used.

Engineering controls are passive, where no action by workers is required. A worker must circumvent a control to be exposed to the hazard.

- Administrative controls limit workers' exposure by controlling work (i.e., rules and policies).
- Individuals wear personal protective equipment to reduce their exposure to the hazard or risk of harm.

APPLICATION TO PSYCHOSOCIAL HAZARDS

How can the hierarchy of controls be applied to psychosocial hazards? Or how can leaders mitigate their teams' risk of exposure to psychosocial hazards that can result in mental harm or injury?

ISO [45003](#) suggests that psychosocial hazards fall into three broad categories: a) work organization, b) social or interpersonal factors, and c) the physical work environment. These psychosocial hazards can cause harm by creating unhealthy stress (e.g., frequency, duration, and intensity). If left uncontrolled, they can negatively impact workers' mental health outlook (e.g., languishing) and create mental harm, injuries, and illness (e.g., burnout).

For employers and leaders to leverage the hierarchy of controls for psychosocial hazards, they must recognize the sources of the most dominant workplace psychosocial hazards, followed by their root causes, interactions, and impact on workers. Some may argue that psychosocial hazards cannot be eliminated because there will always be interac-

tions with other people for organizations to operate.

Once identified, the negative impact of psychosocial hazards on workers' mental health can be mitigated or removed to protect workers from mental harm. Physical hazards (e.g., chemical) are not likely to return to a workplace once removed, but employers must remain vigilant. The same is true for psychosocial hazards (e.g., workload) that, once removed, can more easily return to the workplace and potentially harm workers.

So, just like physical hazards, employers must set expectations for a Plan-Do-Check-Act (PDCA) approach to continual improvement to identify and remove psychosocial hazards that could negatively impact workers' mental health. Leaders should ask affected workers the following questions:

- **Can this hazard be eliminated?** Many workplace psychosocial hazards can be eliminated (or mostly eliminated). This is especially true of *organizational and physical hazards* such as excessive workload, hours of work, and poor workplace conditions like improper lighting and excessive noise.
- **Can we physically separate workers from the hazard?** Though more commonly thought of as a control for physical hazards, the potential for physical hazards such as violence can be greatly reduced by facilitating workplace violence audits and controls like lone worker protection plans, lighting, security barriers, and escorting employees to parking lots at night).

Employers must set expectations for a Plan-Do-Check-Act (PDCA) approach to continual improvement to identify and remove psychosocial hazards.

- **Would a rule or change to procedures reduce the risk?** Developing regulations or guidelines for performing work can reduce the risk of many psychosocial hazards. These include scheduling, staffing, policies, safe work procedures, and working-alone restrictions.
- **Is personal protective equipment (PPE) required?** PPE is usually the least desirable form of control for a hazard since it doesn't reduce the risk in the workplace but should

not be discounted. Supporting workers' mental health and building up their personal psychological protection (PPP) can help them develop resiliency and coping skills to protect their mental health from workplace stress.

Though the hierarchy classification process can focus conversations on determining effective controls, there could be disagreement

over how a control would be classified. We advise against getting hung up on classifying every control. A control's category is less relevant than whether it makes a workplace safer, so adopting a PDCA approach is critical for facilitating a psychologically safe workplace.

When managing psychosocial hazards, leaders must remember that every worker's mental health is variable. Some employees may be more sensitive to psychosocial hazards because of their mental state (e.g., experiencing mental illness). This may result in a need to provide access to mental health support to help them cope with reasonable work-related stress. Ensure leaders are trained in Duty to Inquire and help workers build their PPP.

The interdependency of psychological safety, tacit knowledge and business success

A psychologically safe workplace protects employees from mental harm and promote mental health. In these workplace cultures, employees are comfortable speaking up without fear of retribution or career risk. They feel they belong, are valued, and are typically more confident and comfortable in their roles.

They are also more likely to share tacit knowledge. Unlike explicit knowledge, tacit knowledge is subjective, informal and based on individual experiences. It is difficult to express or extract and can be more challenging to transfer to others, but it is also one of an organization's most critical strategic assets.

Rebeca Isaksson, former director of knowledge management at Microsoft, explains in an [article](#), “You can write a document that explains how to change a bike tire, but only someone who's done it before will know that if you're not careful when you take the tire off, there's a risk that you nip the hose inside.”

When tacit knowledge is shared within an organization, it can help employees avoid costly, preventable mistakes and amplify innovation, creativity and idea generation. It can also help retain valued employees who understand the intricacies of business operations.

AVOID SIGNIFICANT COSTS AND LOST PRODUCTIVITY

When an employee leaves, their employer also loses their tacit knowledge. It has been [reported](#) that the average U.S. enterprise-size company

could lose up to \$4.5 million in productivity annually by failing to share and preserve information.

Psychologically safe employees are more likely to report to work with energy to operate at full potential (e.g., high discretionary effort), which drives engagement, productivity and knowledge sharing and can reduce the chance that they will take disability or quit.

Losing talent and knowledge is costly and can put an organization's viability at risk. Depending on the role, it can take an employee three to 12 months to acquire tacit knowledge.

To get a sense of the impact of this, consider a four-member team in a function that typically takes about six months to learn. If two members were to quit and two new people came on board, the team would be operating at 50 percent capacity for approximately six months—assuming the right hiring choice is made.

Bradford Smart, the [author](#) of *Topgrading, 3rd Edition: The Proven Hiring and Promoting Method That Turbocharges Company Performance*, found the cost of one manager mis-hire at a salary of \$100,000/year is \$1.5 million.

A PEOPLE-FIRST APPROACH IS CRUCIAL

[An HBR article](#) based on research published in the *Journal of Organizational Behavior*, highlights that “knowledge sharing is more likely when employees are autonomously motivated (for example, they'd agree with the statement “It's important to share what I know with colleagues” or “It's fun to

talk about things I know”). In contrast, people are more likely to hide their knowledge when their motivation is driven by external pressures (“I don’t want to be criticized” or “I could lose my job”).

Psychological health and safety must be considered a non-negotiable to avoid this risk and promote vital knowledge-sharing. Investing in psychological health woven into organizational culture positively impacts the employee experience and lowers the risk of losing critical expertise.

Research shows that organizations that take a traditional command-and-control approach suffer from higher employee turnover, disability claims and presenteeism. In these organizations, employees typically have high levels of fear and stress and are less willing to share knowledge than engaged employees.

Investing in psychological health woven into organizational culture positively impacts the employee experience.

BCG’s findings underscore the urgency of prioritizing psychological safety. They [reported](#) that leadership and culture play a crucial role in fostering psychological safety, and 12 percent of employees with the lowest psychological safety levels expressed their intention to quit within a year. In contrast, only 3 percent of employees are at risk of quitting when psychological safety is high.

PEOPLE AND THE TACIT KNOWLEDGE THEY POSSESS ARE STILL CRITICAL TO SUCCESS

AI may change how work is organized and replace people in many functions; however, it cannot replace human instincts, judgment, problem-solving and decision-making that evolve through tangible and intangible factors that become tacit [knowledge](#).

Leaders must ensure that employees feel safe so they are confident sharing what they know and have what they need to succeed in their roles.



Facilitating effective psychological health and safety critical event reviews

The Canadian Centre for Occupational Health and Safety defines an “incident” as any occurrence or condition that results in or could have resulted in injury, illness, or damage. When incidents occur, workplaces typically conduct a “check” (based on the Plan-Do-Check-Act model) into prevention strategies to ensure they are effective and carry out an accident investigation to determine the root cause so steps can be taken to prevent a recurrence.

When incidents cause psychological harm, a critical event review should be conducted. Like an accident investigation, a psychological health and safety (PHS) critical event review will help uncover harmful behaviours and practices that led to the incident.

Specific regulations, like the Canada Labour Code, outline when reviews like these should occur. The following are a few examples:

An employee is bullied by colleagues for six months and forced to take disability leave after a workplace investigation confirmed repeated harassment.

An employee faces unresolved conflict over quality control, resulting in a substantial financial loss for the company. Their efforts to maintain psychological safety led them to remain silent, contributing to a serious product issue.

A manager is known for shouting during stressful situations. Despite undergoing leadership training, the manager’s behaviour drives three employees to resign in search of healthier work environments.

TIPS FOR FACILITATING EFFECTIVE CRITICAL REVIEWS

Creating a structured plan for conducting PHS critical reviews can yield valuable insights. When tasked with a PHS review, I recommend reinforcing the message that it is an essential process to understand the underlying reasons and contexts for mental harm.

- **Gather evidence:** Determine the nature and degree of harm sustained in incidents.
- **Conduct a root cause analysis:** Assess policies, procedures, communication, and training designed to prevent such incidents to determine whether they are effective and whether necessary preventive measures are in place.
- **Learn from findings:** Analyze data to identify gaps and determine what needs to change.
- **Develop an action plan:** Use the findings from your review to implement corrective actions and identify key performance behaviours to mitigate risks.
- **Measure and monitor:** Follow up to ensure that actions and behaviours have the desired impact, and monitor and adjust as needed.

WORK AS A TEAM AND USE THE TOOLS AVAILABLE TO ACHIEVE DESIRED OUTCOMES

Facilitators’ knowledge and skills are critically important. Human resource professionals and OHS representatives should work together to ensure efforts are based on occupational health and safety

principles and trusted resources, such as the Canadian Standards Association CSA-Z1003 Standard.

Tactics such as document reviews, individual interviews, focus groups, anonymous surveys and listening tours with structured focus groups can be helpful in investigating factors and events that led to harm.

CREATE A CULTURE OF PSYCHOLOGICAL HEALTH AND SAFETY TO MITIGATE THE RISK OF INCIDENTS

Take steps to prevent incidents by supporting employees' psychological well-being:

1. **Set clear policies and provide training:** Reinforce your commitment with respectful workplace policies and provide thorough training to build an understanding of acceptable behaviours.
2. **Develop and implement a conflict resolution framework:** Integrate a conflict resolution strategy into your PHS framework so employees understand how conflict can be managed through the 'Four Rs' approach—

recognizing, resolving, rewarding and reinforcing proper conduct.

3. **Adopt a supportive and safe leadership approach:** Adopt a collaborative, trusted leadership approach and avoid command-and-control tactics to promote a culture of psychological safety.

Talk regularly and openly about the policies and expectations to keep people safe, and remind employees of resources such as Employee and Family Assistance Programs (EFAP) and benefits for psychological support. Monitor to identify and remove any barriers preventing the use of these services.

With the right culture in place and OHS tools such as Plan-Do-Check-Act, accident investigations and critical event reviews, you can create an environment where employees trust that you take their health and safety seriously. And if harmful incidents occur, they will know you are committed to taking the necessary steps to prevent them from happening again.



See:

Mental Harm Prevention Roadmap

for tools and resources to help you implement a workplace psychological health and safety strategy

Using the 3E model for workplace mental health management

It is estimated that mental health claims have risen by [75 percent](#) since 2019, and [12 billion working days](#) are lost globally every year to depression and anxiety, at a cost of \$1 trillion US in lost productivity.

Statistics Canada [suggests](#) the most common cause of work-related stress is workload, which impacts about 24 percent of workers, followed by 16 percent concerned about balancing the demands of work and personal lives. The World Health Organization cites additional factors, including:

- Under-use of skills or being under-skilled for the work
- Excessive workloads or work pace, understaffing
- Long, unsocial or inflexible hours
- Lack of control over job design or workload
- Unsafe or poor physical working conditions
- Organizational culture that enables negative behaviours
- Limited support from colleagues or authoritarian supervision
- Violence, harassment or bullying
- Discrimination and exclusion
- Unclear job role
- Under- or over-promotion
- Job insecurity, inadequate pay or poor investment in career development
- Conflicting home or work demands

When you add stressors outside of work, such as the aftermath of the pandemic, financial insecurity and family issues, it's easy to see why this is a significant risk for employers.

STRATEGIES FOR MINIMIZING WORKPLACE MENTAL HEALTH CLAIMS

The Canadian government estimates that over [17 percent](#) of reported illness or injury claims for EI are due to stress, anxiety or mental health issues, second to injury, surgery, and disease. Benefits Canada reported that, in 2022, more than [33 percent](#) of all disability claims by employers who provide short- and long-term disability were due to mental illness.

Not surprisingly, many leaders are exploring strategies to mitigate this significant risk.

THE 3E MODEL

I often recommend the 3E Model to clients. This model focuses on *environment*, *education*, *exit* and *entrance* to enhance the employee experience and manage mental illness disability claims.

ENVIRONMENT

Leaders can control how work is organized, help employees have positive and constructive interpersonal interactions with peers, customers and leaders, and provide resources and equipment to help everyone succeed.

Ultimately, leaders should be committed to creating a positive employee experience to help people flourish and mitigate the risk of mental health-related claims.

Ask yourself and your leadership team these questions:

- *How effective is our approach to protecting workers from mental harm and promoting mental health?*
- *How do we objectively define and measure the success of our mental health and employee experience initiatives?*

If you're not sure, or you don't feel that the mechanisms you have in place are effective, these steps can help you get started:

1. **Assess employees' work experience**—When the workload is managed effectively, it feels right and invigorates employees. However, when demand outstrips capacity and workload becomes overwhelming, it will start to drain employees and can lead to more significant mental health issues. Take the temperature in your workplace. Conduct one-on-one interviews or focus groups or use assessments such as the WPSA to determine how employees feel and evaluate the effectiveness of policies, processes, workload management, and support programs to determine whether they are used, understood and valued.

2. **Design or redesign based on what you learned**—If you ask these questions, you must be prepared to respond. If you gather information and do nothing, employees will feel you're not committed to their well-being. Use insights to problem-solve, make decisions, terminate ineffective programs, budget for new ones, and reassess and set realistic

expectations and goals. Be clear that you are not trying to boil the ocean. Take a focused approach. Doing less well is often better than trying to do too much.

3. **Plan-Do-Check-Act**—Implementing a PDCA approach will enhance new or redesigned initiatives' usage and perceived value. In addition to ensuring you communicate regularly and follow change management best practices, it will increase the likelihood that information and resources translate into healthy habits that mitigate mental harm and help employees flourish.

EDUCATION

Early access to mental health support programs can help prevent disability claims. Ensure all

workers know about the mental health resources and supports you offer. Employees should know how to access workplace support and community programs, how the EFAP program works, and be aware of prevention programs to help them develop coping skills.

Ask yourself and your leadership team these questions:

- *What mental health supports (e.g., EFAP, psychological health benefits coverage) do we have, and how do we inform and educate employees about them?*
- *Do employees understand how to access support and realize that conversations and information they share are confidential?*

Communicating and educating employees early and often is critical. In addition to eliminating confusion and uncertainty, openness and encouragement will break down stigma and fear so em-

Use insights to problem-solve, make decisions, terminate ineffective programs, budget for new ones, and reassess realistic expectations and goals.

employees can access help quickly and efficiently when needed.

EXIT AND ENTRANCE

Stigma and feeling like an outsider are common challenges when returning to the workplace. Exit and entrance plans should be in place to ensure that employees feel connected when they are away from work and supported by leadership and their peers when they are ready to return.

Ask yourself and your leadership team these questions:

- *What is the plan to support employees who must go off work to deal with mental health concerns, and do we have a plan in place for their return?*
- *How do we evaluate employees' experience with disability management and return-to-work programs?*
- *What are we doing to help employees who take time off work get the support they need to get well?*

An organization's size is often a factor in workplace mental health claim management. Many small businesses lack short or long-term disability management programs. As a result, employees who take time away from work to deal with a mental health concern must navigate the public mental health system while they are trying to get better, which can be overwhelming. To address this, small business employers can provide a playbook with information about public mental services, such as CMHA and community-based resources (e.g., substance use treatment and gambling support).

Ensure leaders and teammates are prepared and clear about expectations in supporting peers returning to work, whether for mental illness, cancer, surgery, or pregnancy. Employees should also understand that accommodations may be in place.

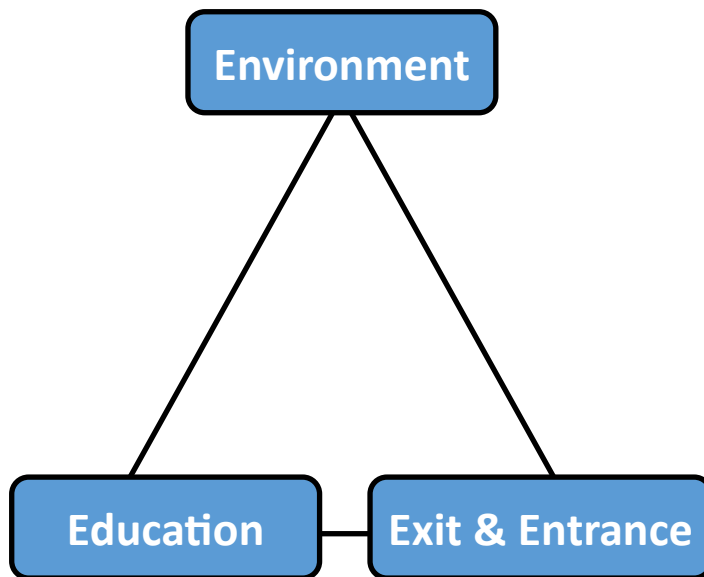
Manage workload realistically. A gradual re-

turn to workload and other accommodations (e.g., half days) may help a worker get back on track at a pace that does not create harm.

All employees should know that time away from work will be treated confidentially, with respect and support based on individual needs. Ensure everyone understands the importance of being helpful, professional and supportive so employees returning to the workplace feel psychologically safe, included, welcomed and supported. There can be no tolerance for oppression, omission or incivility.

Tackling this issue doesn't require leaders to be workplace mental health experts. However, they must recognize their essential role in controlling workplace factors, encouraging healthy habits to mitigate the risk of harm and mental health claims and helping those who are or have been unwell return to feeling healthy, strong and flourishing at work.

The 3E Model



Building your workplace mental health performance scorecard

Most employers recognize that creating a psychologically safe and inclusive workplace is essential to protect employees' mental and physical health and optimize performance. However, figuring out where to start and feeling confident that you're investing in the right programs and activities can be challenging.

USE THE PLAN-DO-CHECK-ACT APPROACH TO OPTIMIZE RESULTS

The Mental Harm Prevention [Roadmap micro-site](#) is a great resource to help you get started. It explains how to create a workplace mental health game plan to reduce mental harm and promote mental health regardless of your organization's size or resources. The site discusses the Plan-Do-Check-Act (PDCA) approach, which is rooted in continuous learning and improvement and offers a solid foundation for your strategy. Implementing PDCA provides the structure and insights you need to plan, implement and evaluate the impact of your activities and investments.

- **Plan**—Identify problems/challenges/opportunities.
- **Do**—Implement solutions.
- **Check**—Assess results.
- **Act**—Continue efforts and investments providing desired results and stop those that aren't.

TIPS FOR BUILDING A WORKPLACE MENTAL HEALTH PERFORMANCE SCORECARD

Consider the energy, time, dollars and resources you invest in mental health initiatives. Why have

you chosen these programs and activities? What are your desired outcomes? A well-built scorecard will help you track and assess whether your investments are achieving the desired results. Avoid making your scorecard unrealistic or overly ambitious. Adopt a less-is-more mindset and be clear about your targeted outcomes. Use the following questions to identify evidence-based measures that you can use to assess the Value of Investment (VOI) and Return on Investment (ROI).

1. *What are the top two targeted outcomes expected from your workplace mental health initiatives?* For example, you may want to:
 - Reduce short-term disability costs related to mental health
 - Decrease turnover and workplace incivility
 - Increase attraction and retention
 - Boost financial performance per FTE

When you've decided what to focus on, establish a benchmark for each targeted improvement.

2. *What are one or two key performance indicators (KPIs) for each targeted outcome?*

Identify the appropriate KPI to suit your desired outcome. KPIs help ensure your strategy is being implemented effectively. There are often obvious and less apparent indicators that you can use. For example, if you want to reduce short-term disability claims, you may track sick time, but bullying and harassment complaints might also be essential to watch. These often lead to stress and mental harm and can increase the risk of lost time.

3. What key performance behaviours (KPBs)

will directly impact your KPIs and targeted outcomes?

When identifying KPBs, consider behaviours that can have a positive impact when they become habits. You may want to engage employees in focus groups to solicit their input.

Collect data to inform initial planning and monitor whether you’ve selected appropriate KPBs. With the correct data, you can ensure the behaviours you’ve identified drive your KPIs and targeted outcomes.

Need help gathering data, assessing gaps and building impactful programs? Visit the Workplace Safety & Prevention Services (WSPS) [Mental Health Consulting](#) page to learn how WSPS mental health consultants can help you achieve your goals.

ENSURE YOUR INVESTMENT AND EFFORTS HAVE THE DESIRED IMPACT

It’s not uncommon for organizations to track activity-based results, but these are superficial and

don’t provide the rich insights you need to understand if your money and time are well spent. For example, reporting to your CEO that 90 percent of leaders have taken one day of training in the last 12 months may sound good, but you need to assess outcome-based results to understand the impact of your efforts.

The PDCA approach provides the insights and evidence to assess what is working and what’s not and determine whether your programs have the desired impact.

A sample scorecard illustrates how you can pull this information together. Using the [Workplace Psychological Safety Assessment](#) (WPSA), Company ABC found that 65 percent of its workforce is languishing, and 85 percent has been exposed to incivility (rudeness) acts in the past 12 months. This organization could use the scorecard to track and report results.

Version 1.0 Workplace Mental Health Performance Scorecard Template				
Company ABC — June 2022-June 2023				
Note: Complete one row for each targeted outcome.				
Targeted Outcome: Reduce short-term disability claims		Key performance indicator for targeted outcome: Reduce average sick days		Targeted KPBs to impact KPIs: Focus on providing employees with mental fitness programs and remind them at least once a month in team meetings of all support programs in place. Have all employees complete safe and respectful training.
Baseline	Target: Improvement in 12 months	Baseline 8.8 days per FTE	Target Improvement in 12 months	Provide all employees access to the MFIQ app and one hour of training, the Fuzzy Line of Rudeness to promote civility in the workplace.
93 claims	Reduce claims by 5% YOY		Reduce sick time by 5% YOY	KPB early success metrics: Drop in % of workforce languishing and experiencing acts of incivility from Test 1 to Test 2 WPSA.
Targeted Outcome		Key performance indicator for targeted outcome:		Targeted KPBs to impact KPIs:

Your scorecard doesn’t have to be complicated. It just has to provide an accurate picture of what’s working and what’s not. As the saying goes, “What gets measured gets done.” Building a scorecard is essential in aligning activities and ensuring that the time, money and effort you’re investing are having the intended impact on employee health and well-being and organizational performance.

Why workplace mental health programs often miss their mark

If you experience a minor cut on your leg, you apply a Band-aid to protect the wound and help your body heal. In contrast, if you suffer a deep leg wound in an industrial accident, someone trained in first aid will apply pressure and slow the bleeding until a surgeon can repair any severed arteries to ensure healing.

This analogy illustrates a crucial point about workplace mental health and psychological health and safety. Many organizations deploy “band-aid” solutions, such as workshops or stress-management programs, which may provide temporary relief but often fail to address the underlying risks that can result in mental harm, injury and illness.

Just as superficial treatment won’t fix a deep cut, surface-level interventions won’t effectively eliminate the root causes of psychological distress—whether workplace culture, lack of support or unmanageable workloads. Without identifying and tackling core issues, mental harm risk increases. Employers must shift their focus from quick fixes to comprehensive strategies that ensure lasting psychological safety for everyone in the workplace.

DESIGNING PSYCHOLOGICAL HEALTH AND SAFETY INTERVENTIONS

The most crucial coaching tip I offer employers is that addressing symptoms without a deep understanding of the underlying environment leaves many mental health programs failing to create a meaningful impact.

Take, for instance, Company A, where leaders

struggle to build trust and rapport with their teams. Complaints arise about leaders being short-tempered and uncaring. In response, the company provides leadership training, believing that equipping leaders with new tools will solve the problem. After attending an intensive two-day, off-site training program, the leaders return energized yet find themselves back in a challenging environment.

Imagine these leaders returning to a workplace operating at 80 percent capacity due to staff shortages, with tired employees, rising turnover and senior leadership pushing for ambitious targets. Unsurprisingly, the newly acquired skills from the training do little to improve employee morale or relationships. Nor do these skills help leaders who are stressed and at risk of burnout.

This scenario underscores the danger of treating symptoms—upset employees and ineffective leadership—without investigating their root causes. In this case, the problems extend beyond leadership skills. They include factors such as employee and leader burnout, staffing issues and unrealistic performance expectations supported by limited resources. The problems include a lack of understanding of why capacity is down to 80 percent, employees going on disability leave or quitting, and vacancies remaining unfilled.

Cultivating psychological safety requires a thorough root cause analysis to understand what psychosocial factors are charging and draining employees’ batteries to the point of being psychosocial hazards that create harm.

Understanding the systemic drains on a workforce—inadequate staffing levels and high workload pressures—allows the employer to implement solutions addressing these core issues. Only then can they create a supportive environment where leadership training can produce lasting results and positively transform the employee experience.

UNCOVERING THE TRUTH BEHIND EFFECTIVE WORKPLACE MENTAL HEALTH PROGRAMS

Leaders must move beyond activities and information dissemination to add value and make a meaningful impact. There are no shortcuts to fostering a mentally healthy workplace. However, when intentional actions are applied consistently within a structured Plan-Do-Check-Act framework, organizations can cultivate the habits, culture and energy needed to protect and promote mental health.

Random acts of wellness and superficial “check-the-box” initiatives cost companies millions of dollars globally while contributing little to improving workplace mental health. To reverse this trend, decision-makers must commit to uncovering the truths and facts that underpin a psychologically safe work environment. By prioritizing efforts and planning strategically, organizations can create sustainable practices that address symptoms and nurture a robust mental wellness culture for all employees.

Leaders must move beyond activities and information dissemination to add value and make a meaningful impact.

ADOPT A SYSTEMIC APPROACH TO WORKPLACE PSYCHOLOGICAL SAFETY

The first crucial step in enhancing psychological safety is analyzing the workplace through a systems lens. Review available data from the past 24 to 36 months to identify trends impacting employee mental health. Understanding that employers and employees share accountability is essential. Collaboration and open dialogue foster a culture that promotes and protects mental health.

Consider three key clusters influencing work-

place dynamics: how work is organized, the quality of interpersonal interactions, and whether employees have the necessary resources and environment to perform at their best. Each cluster encompasses staffing levels, a safe and respectful culture, leadership styles, environmental conditions, recognition programs and work demand. These factors can drain or charge workplace energy.

To effectively identify what is draining or charging your workplace system, actively engage key stakeholders and seek their input. Employing an intersectional lens ensures the data collected reflects the workforce’s diverse perspectives. Data collection methods can include qualitative approaches such as interviews and focus groups and quantitative tools like workplace risk assessments and pulse surveys.

The objective is to gather comprehensive data that accurately depicts the symptom load and identifies likely root causes based on factual insights. By taking a systemic approach rather than

opting for quick fixes or band-aid solutions, organizations can create a healthier, more supportive work environment that enhances psychological safety for all employees.

FOCUS ON REDESIGNING THE ENVIRONMENT TO ADDRESS ROOT CAUSES

During the planning phase of the Plan-Do-Check-Act cycle, ensure that proposed interventions prioritize creating a workplace environment that reduces drains on mental health. This involves identifying and implementing controls to eliminate risks and promote mental well-being.

Redesigning the work environment can involve several key areas, including re-evaluating recruitment practices, adjusting staffing levels, modifying overtime policies and clarifying work demand expectations. These changes can directly influence employee experiences and reduce stressors con-

tributing to mental harm.

Decision-makers must consider the cost of inaction. Understanding the potential consequences of maintaining the status quo highlights the urgency of addressing current trends and reinforces the value of making proactive changes.

Employers should adopt a systemic approach to implementing strategies to enhance the employee experience. They must define what aspects of the work environment they can control, such as staffing and policy adjustments, and recognize employees' responsibilities of developing resilience and fostering respectful interactions with peers. By addressing the environment and individual behaviours, organizations can tackle the root causes of mental health drains more effectively, leading to healthier workplaces where everyone thrives.



Exploring psychological health and safety lead indicators

For psychological health and safety (PHS) to have a real impact, it must begin operating like occupational health and safety, with a clear mandate on what is and is not considered “good.” I coach leaders assigned to PHS that it does not need to be complicated; it needs to be tangible and measurable.

Human emotions that influence thoughts and behaviours predict mental harm risk in a workplace. Regardless of sector, profession, age or gender, an employee’s experience creates positive and unpleasant emotions that influence their mental state, beliefs and behaviours.

Though many workers aspire to be rational, it is not practical to expect this all the time, especially when workers are tired, stressed, worried about employment or live in fear of being hurt or threatened. The emotional system provides human input on experience, whether favourable or not.

PHS aims to protect employees from mental harm and promote mental health. Employees’ beliefs influence their thinking (e.g., whether the employer cares) and actions (e.g., whether they stay or go).

PHS is not about fixing people. It is about protecting and promoting opportunities to develop psychological protections that help employees regulate and react to their situations under pressure.

Information is helpful only if it creates habit changes that achieve desired outcomes. Many PHS initiatives and workplace mental health strategies overlook this. Humans do not always do what is best for them. I often remind people how hard it is to get someone to drink 3-4 litres of water a day.

A psychologically safe workplace has many moving parts, including work organization, interpersonal

interactions, equipment, and the environment. All these factors can impact employees’ emotional systems.

THE OPPORTUNITY FOR PHS

Employers do not need to be PHS experts or psychologists to facilitate PHS lead practices that predict and protect employees’ emotional well-being. For example, if asked to compare Team A, whose leader yells, plays favourites, and leads by fear, to Team B, which has a firm, fair leader who cares about the employees’ well-being, most CEOs know which team will have better employee engagement. They would pick Team B.

Ample [research](#) demonstrates that engaged employees are more innovative, creative, and willing to go above and beyond their job requirements, leading to higher productivity and organizational performance.

PHS or workplace mental health initiatives are often designed as standalone programs with no connection, program evaluation or measurement. If there is some measurement, it is frequently activity-based, such as check-the-box utilization.

A well-designed PHS program has a clear line of sight on what psychosocial factors create positive charges and unpleasant emotional drains in a workforce. A psychosocial factor can positively or negatively impact the employee experience. When factors like work demands become problematic, they can develop into psychosocial hazards, resulting in mental harm, injury and illness.

PHS aims to directly impact the employee experience and an organization’s ability to achieve its full potential.

COMPANY Z: A CASE STUDY

The following lead indicator example demonstrates a process that requires auditing and validating its benefits and the value of a PHS lead indicator.

Company Z decided to focus on PHS and adapted some core elements of the CSA Z1003 Psychological Health and Safety Standard. Once senior leadership buy-in and support were obtained, the PHS champion formed a small committee that included all key stakeholder groups.

The committee defined its roles and scope and completed a full review of all current employee data trends, such as disability and workers' compensation claims, turnover, and prevention and support programs and policies designed to support employees' experiences and mental health.

The committee then established a baseline of psychosocial risk factors and employee perceptions of the current programs and policies and set out to understand the risk of incivility, bullying, harassment and workplace violence. When picking a workplace assessment tool, the committee selected an instrument that provided metrics that could be retested to evaluate progress and determine if the tool was valid.

The committee chose the Workplace Psychological Safety Assessment ([WPSA](#)), an evidence-based workplace assessment tool run through a university that has generated data that has contributed to peer-reviewed publications.

After collecting data, the committee chose leadership as a psychosocial hazard to focus on to improve employees' experiences interacting with their direct managers. The organization had a cultural history of command-and-control leadership and wanted to move towards a trusted leadership style. The committee's trend analysis showed that leaders

perceived as command-and-control individuals had higher turnover rates and disability claims on their teams than more trusted leaders.

The targeted outcome was to decrease the leadership psychosocial risk hazard. The lead indicator to be piloted was the benefit of leaders completing an evidence-based Psychologically Safe Leader program, which included online training and follow-up accountability peer-to-peer meetings.

Leaders were expected to meet weekly for 10 minutes to report what key performance behaviours (i.e., regular feedback) they were practicing, their progress, and their areas to improve. These sessions also allowed leaders to seek peer guidance. This post-course accountability activity would be continued over six months and tracked through the company's learning management system.

Piloting and validating any PHS lead indicator helps us understand it. In the case of Company Z, the thesis was that training leaders in psychological safety and engaging them in peer-to-peer follow-up meetings would help correct the forgetting curve and support leaders in developing new habits that would show up in their day-to-day interactions with direct reports.

The Plan-Do-Check-Act approach validated this new PHS lead indicator using short, monthly pulse checks on the employee experience, listening tours, and comparisons of year-over-year results. Once validated through a PHS lens, a lead indicator can make its way onto a PHS scorecard.

For a PHS lead indicator to be of value, it must be behaviourally based, specific, tested and validated in the culture to predict the desired outcome. In the case study above, more positive interaction between managers and employees drove increased engagement.

Considerations for an organizational psychological health and safety scorecard

Adherence to a Plan-Do-Check-Act (PDCA) framework is at the core of psychological safety success. One challenge I continue to observe with many organizations dipping their toes into psychological health and safety scorecards is a lack of awareness about the gap between activities and evidence-based outcomes. In other words, sending employees to training does not mean anything changes.

Improving psychological health and safety's (PHS) impact requires understanding that its role is mitigating mental harm and promoting mental health. Since the environment can play a dramatic role in eliminating or mitigating harm, employers have a direct role in reducing unpleasant emotions like fear and protecting employees from harassment, bullying and workplace violence.

It's encouraging to see [Safe Work Australia](#) updating its legislation to make employees accountable for immediate notification of any worker engaged in death by suicide or suicide attempts at work or home that could be linked to the workplace. During my 30-plus years of clinical work, I have witnessed a direct link between employees' workplace experiences and death by suicide numerous times.

The case of the France telecom CEO who was jailed over a restructuring policy linked to employee suicide is a reminder to all CEOs that stressing employees beyond their ability to cope can result in significant mental harm, injury, illness and death. Even with all the conversations about mental health today, too many CEOs do not fully un-

derstand that how work is organized and facilitated can positively or negatively impact employee well-being.

Most CEOs know why earplugs are needed but not why employees mustn't live in constant fear. From its legislative updates, Australia clearly understands that education, encouragement and enforcement are required to help CEOs "get it."

This is where a PHS scorecard can help: it aims to measure if the things being done to protect employees' emotional well-being are working.

CONSIDERATIONS FOR DESIGNING A PHS SCORECARD

Let's look at the example of Company X, which has experienced significant organizational changes. Work demand is increasingly perceived as a drain by a substantial percentage of the workforce (e.g., they chronically feel the employer's expectations are unrealistic), which has converted this psychosocial factor to a psychosocial hazard.

When a work demand's frequency, duration and intensity increase, employees feel expectations placed on them are excessive, and they have no clarity on when things will improve, it increases their risk of mental harm, injury and illness.

As part of Company X's new journey, it conducts an evidence-based PHS [workplace assessment](#) and uncovers insights such as work demand concerns. This is the **Plan** stage, during which the company collects data through surveys and focus groups to understand the employee experience and determine its strengths and opportunities.

The planning stage explores how to remove or control hazards and determine what protective factors might mitigate risk. In this example, the action plan determines that the hazard of excessive work demand will be a priority.

I coach employers that less is more. It is prudent to do a few things focused on prevention to ensure there is capacity and energy to follow up.

The planning phase typically provides recommendations like redesigning work, tweaking or updating policies and procedures, and leveraging new technologies such as AI to ease the workload. It may also include implementing programs like [psychologically safe leadership](#) and [mental fitness training](#) to facilitate work and help employees thrive.

The **Do** stage involves communicating and implementing the plan. Where things often slip is the lack of a **Check** to measure if the company's approach is working. The **Check** phase aims to ensure new behaviours and habits required to change the employee experience are being adopted and are on track.

By doing regular checks, employers can move to the **Act** stage, which leverages a continuous improvement lens to improve or change action steps to increase impact. Proposed action plans are typically OK. However, lack of impact often results in a lack of focus in the **Check** and **Act** stages. This tendency was noted in a recent [CSA research study](#) as an opportunity for improvement.

MEASUREMENT AND REPORTING

Imagine that in the above example, Company X

found hazards that leaders are concerned about. The leaders see a clear link between these hazards and key performance indicators (KPIs) such as disability claims, attendance, turnover, accidents, and workplace conflict and violence incidents. In addition, a link has been made to explain how the above KPIs can negatively impact an employer's financials, sales targets, customer service, productivity goals and success metrics.

A well-designed PHS scorecard begins with clarity and intention that can answer the *Why, What* and *How* for each desired action plan outcome. It does not need to be complicated. It must be logical and put into simple terms that can be explained to a CEO in less than 60 seconds so they understand the benefits and why the investment of resources is required (i.e., business case). The most critical focus of any CEO is their organization's short- and long-term sustain-

A well-designed PHS scorecard begins with clarity and intention that can answer the Why, What and How for each desired action plan outcome.

ability, defined by the quality of its products, services, process efficiency, people capacity, safety and health. These three imperatives are core factors in predicting success in achieving any organization's financial and service delivery goals.

Every KPI should indicate what must happen to achieve the desired outcome—the targeted key performance behaviours (KPBs) to predict opportunity for success. This takes more thought and effort but pays off. Rather than just listing the activities in the plan (i.e., leadership training), be clear on a few desired KPBs that will be measured.

The defined KPBs are the PHS lead indicators of change. In occupational health and safety at a power company, an example of a KPB may be

that “alert checks” are done on a teammate before they climb a hydropole. A partner goes through a checklist to ensure the climber is tuned into what is up the pole, is mentally focused, and has the correct equipment. This KPB goal is to reduce risks such as a tragic death by electrocution.

In most organizations, workplace mental health plans only list activities, with little foresight into monitoring KPBs or evaluating and measuring impact, such as the value of and return on investment.

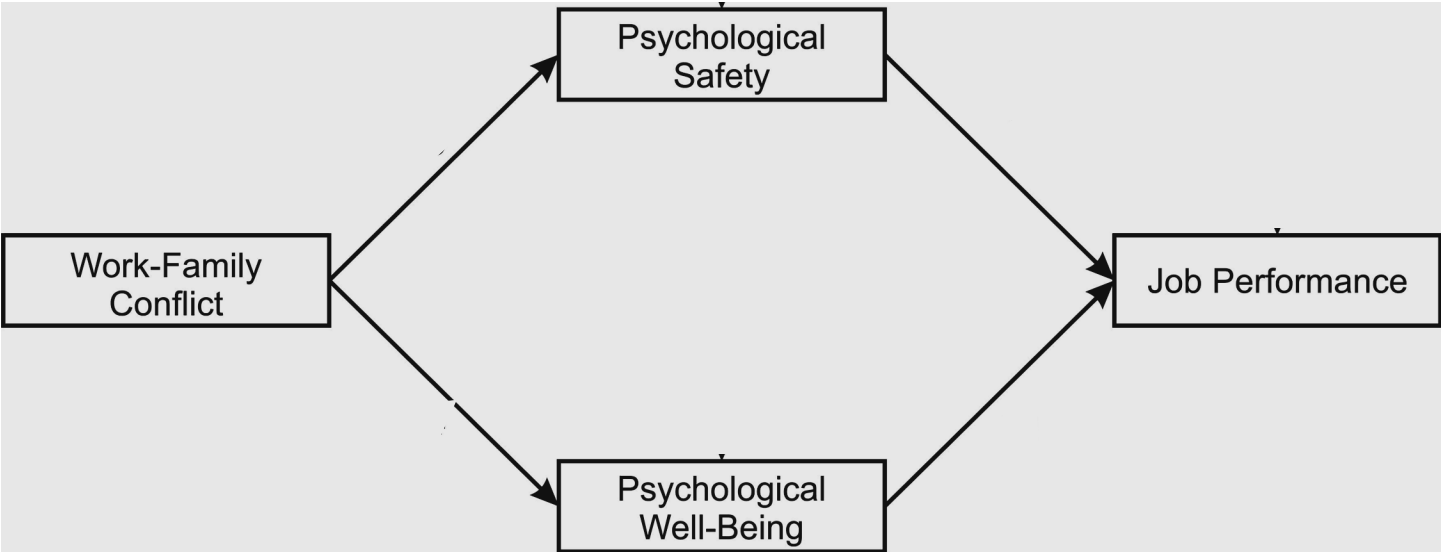
When highlighted and practiced, KPBs drive and support the PDCA framework and steps because they require constant monitoring and measuring to evaluate if the behaviours and habits are in place. OHS understands that KPBs are non-

negotiable. There is work to do in the emerging space of PHS to move this conversation from activity to habits, thoughtful measurement, and program evaluation that drive a constant accountability feedback loop.

A well-designed PHS scorecard can help employers understand if their time, effort and investment are impacting the employee experience.

Start with a simple scorecard that measures a few items, matures the PHS program and improves one KPB, one KPI and one outcome at a time.

Ultimately, there is a balance between working in and on an organization, and those facilitating PHS must learn how to find opportunities to make an impact.



Launching a psychological health and safety program

With changes in legislation, growing union pressure on employers to implement the CSA-Z1003 standard for Psychological Health and Safety in the Workplace, and increased disability costs linked to mental health, more employers are beginning psychological health and safety (PHS) programs. Regardless of their motivation, employers should be clear on their why, what, and how before launching a psychological health and safety program.

I've supported many organizations in their PHS journeys over the past 10 years. One piece of advice I share with all clients, regardless of size, is that information alone is never enough to influence human behaviour. Change often requires clarity on the desired behaviours, follow-through, and measurement to achieve the desired habits and outcomes.

All PHS programs require two-way accountability between employers and employees. Employers can influence environmental factors such as how work is organized and facilitated, and employees can control how they show up, interact with peers, and care for their health.

The coaching tips outlined below can help employers and designated PHS champions accountable for designing and implementing psychological health and safety programs. Too often, employers jump to random acts like leadership training, employee and family assistance program (EFAP) promotion, and stigma campaigns that are not aligned or packaged to help employees experience more positive than negative emotions in the workplace.

Remember: negative emotions are not necessarily always bad. They are a part of the human condition for growth and learning. However, negative emotions can be harmful when employees feel stuck in them. For example, one group of 100 employees may spend 60 to 70 percent of their time in the workplace fearing failure. The consequence of this chronic negative emotion is distraction, frustration, and unnecessary stress and strain, negatively impacting the team's performance and the well-being of some members. People have physical and psychological limits to what they can tolerate before harm occurs.

HOW DO EMPLOYERS PROTECT AND PROMOTE EMPLOYEES' MENTAL HEALTH?

Workplace culture can be compared to a [fish tank](#): when the tank is dirty, the fish don't thrive as in a clean tank. Once employers understand this and accept their roles, they recognize that for a PHS program to have an impact, they must commit to reinforcing, monitoring, and measuring to ensure issues are identified, addressed, and continuously managed so they do not arise again.

A thoughtful PHS program allows employers to mitigate mental harm and promote mental health. Well-implemented PHS programs decrease disability, absenteeism, and turnover costs and increase productivity, innovation, retention, and employee well-being.

PHS programs must adopt a Plan-Do-Check-Act (PDCA) approach. They should aim to support employees in thriving and reduce unnecessary drains like work demands to prevent mental harm, injuries, and illness.

WHAT'S THE MINIMUM AN EMPLOYER NEEDS TO DO TO BEGIN THEIR PHS JOURNEY?

The first step for an employer's PHS champion(s) is understanding where they are starting. I encourage any PHS champion to obtain PHS capacity training because this field is emerging. The fundamental [competencies](#) a PHS champion needs include mental health literacy, program evaluation, PHS 101 basics, measurement, and crisis management.

A simple place to begin is an inventory of programs, such as EFAP, benefits, critical incident stress, surveys, leadership training, and resiliency.

Categorize each program as preventing mental harm or supporting employees who are experiencing mental harm. Also, inventory all relevant policies (i.e., a safe and respectful workplace policy) and learn how or if each is measured for impact beyond participation.

This first step is often referred to as the PHS audit. It is a simple audit, but the organization's PHS maturity should influence its complexity. I coach that less is more for organizations new to PHS and just beginning their journeys. The goal is to understand what leadership has supported, allowing employees time to participate and providing a budget where needed.

I caution employers that engaging in an overly complex PHS audit that does not align with their PHS maturity and readiness can overwhelm the implementation team. The audit does not have to be complicated. An excellent way to start is to get clear on what is charging and draining employees' batteries and be willing to address the drains.

The audit will provide insights into current prevention and support elements and how psychosocial factors like how work is organized, interpersonal relationships, equipment, and climate are draining employees, creating the risk of mental harm, fatigue, and burnout.

You must engage workers through interviews and focus groups to understand drains and charges. This information should also be validated via evidence-based workplace assessments like the Workplace Psychological Safety Assessment ([WPSA](#)). However, workplace assessments are useless if employers are not committed to act on the results.

A simple place to begin is an inventory of programs, such as EFAP, benefits, critical incident stress, surveys, leadership training, and resiliency.

Workplace risk assessments aim to set goals as to what employers may do. They may decide to redesign a process, train leaders to become trusted leaders, increase the focus on civility through education, or provide employees with insights into developing resiliency and the employer's role in supporting it.

As PHS facilitators develop more competencies and confidence in removing drains, they may want to mature

their program by adopting or adapting the CSA-Z1003 standard for *Psychological Health and Safety in the Workplace*. This standard provides guidance on what to do; however, it will be up to the employer to decide on how. When starting a new PHS program, I advise that less is more; employers should focus on the desired habits and outcomes.

HOW TO IMPLEMENT PHS PROGRAM GOALS

Telling employees you care about them differs from showing that you care day in and day out.

PHS is about positively influencing employees' feelings and helping them navigate challenging situations in a supportive and caring way. When done well, PHS programs incorporate the human factor into how work is done, increasing opportunities for inclusion, learning, accountability, and respect. Employees who feel they belong, are unafraid to share their thoughts, believe their contributions matter, and feel a sense of purpose are rocket fuel for an organization to achieve its full potential.

When implementing any program, policy, or procedure change, never assume it will be easy or you'll only have to mention it once. There's no such thing as "done" or "perfect" in PHS; it's a quest for continuous improvement and excellence.

When testing a PHS initiative, I leverage pilots to discover how to communicate, launch, deliver, and support the initiative. For example, PHS data collected in the audit stage may indicate that training leaders to become psychologically safe leaders could move more of them from command-and-control to trusted leaders.

To kick off this initiative, pilot the selected training with one group of leaders to discover how best to implement it, evaluate its benefits, and learn how to improve it.

The pilot can determine if the initiative facilitates the desired knowledge, skills, and key performance behaviours and, if successful, what key performance indicators and outcomes can be achieved. Pilots force a PDCA versus a check-the-box approach.

SEVEN CONSIDERATIONS FOR LAUNCHING A PHS JOURNEY

PHS is a journey without a finish line. Once senior leadership provides support and a mandate to begin a PHS journey, these seven steps can help your organization get underway:

- Offer **PHS facilitators** support in pursuing training and developing their knowledge and skills in PHS.
- Mandate a **PDCA approach**.
- Conduct a **PHS audit** aligned to the organization's PHS maturity. Start with the basics; do not over-engineer this step.
- Conduct a PHS **workplace risk assessment** to understand drains and charges through your employees' eyes.
- Develop a **plan** to address gaps and maintain strengths. This plan should include clear, measurable goals beyond participation. Get employee input through consultation and pilots to address drains and maintain chargers.
- Set expectations for minimal mental health **supports** (e.g., all employees will be given access to mental health support when needed). These supports may include access to counselling or psychological services, education about the 988 suicide crisis line, community mental health and addictive disorder services, and domestic violence community support. Employers should also be clear on dealing with crises such as critical incident stress situations and providing trauma-informed workplace support.
- Be clear that **prevention** is proactive and requires monitoring psychosocial factors. When anything becomes a chronic drain and negatively impacts an employee's experience at work (e.g., a bullying boss), it must be addressed quickly. Determine what education will be offered and why, from leadership and stigma training to promoting help-seeking behaviours, mental health literacy, and opportunities to develop coping and resiliency skills, as there is no way all stress or unpleasant emotions will be removed from a workplace.

Preventing workplace mental harm begins by asking questions

What percentage of your workforce is at risk of workplace mental harm?

Before answering this question, you must understand mental harm. Workplace mental harm may not be permanent but could impact an employee's judgment or behaviour. It can be likened to an injured ankle that is sprained, not broken, but still impairs walking. The person can continue walking with treatment and support while the ankle heals.

Employers must understand that an employee feeling overwhelmed by unrealistic expectations can lead to psychological injury, which prevents them from performing their daily functions and compromises their effectiveness. At that point, they will benefit from seeing a [mental health professional](#) who can assess their impairment and disability.

HOW MUCH STRESS DO YOUR EMPLOYEES EXPERIENCE DAILY?

An estimated [57 percent of American and Canadian](#) workers feel stressed. When I discuss workplace mental health with a CEO, we talk about how psychological safety can support and drive productivity, protect tacit knowledge, reduce lost time and promote organizational resiliency and sustainability. The conversation eventually gets to employees' experience, but I have found focusing on the outcomes and tangible financial benefits of investing in workplace mental health is helpful.

Employers genuinely concerned about employee burnout and job stress can ensure programs are

in place to support employees' mental health. However, such programs tend to focus on the employees, not the root causes of their stress.

Micheal Leiter and Christina Maslach, two leading global experts in [workplace burnout](#), report burnout is a response to chronic job stress. They suggest burnout is akin to the proverbial canary in the coal mine, meaning that when employees experience burnout, it is prudent to look beyond the individuals to their environments and the root causes of their stress.

Providing employees with a resiliency or mental fitness program, a resiliency mental health app, or access to an employee assistance program can be helpful when implemented with a thoughtful workplace mental health program. Unfortunately, employers too often focus on tactics and fail to address the root cause, which may be how work is organized and managed.

For example, employees who work in a command-and-control culture and live in fear will likely never feel comfortable and constantly experience stress. This mental state increases their risk of mental harm and injury.

HOW EMPLOYERS CAN PROTECT EMPLOYEES FROM MENTAL HARM AND PSYCHOLOGICAL INJURY

My advice to employers is that impact requires a system approach. I often use a [fish tank analogy](#) to point out that maintaining a clean tank is critical to the fish's health.

A guiding principle for mitigating employees'

risk of mental harm, such as workplace stress and burnout, is promoting a two-way accountability approach where employees and employers create a workplace for employees to flourish.

The following four-step model begins by asking workers and leaders what they are experiencing. It is beneficial to understand current risks, factors contributing to risk, and the percentage of the workforce languishing and flourishing, as well as to search for evidence of programs doing what they should be doing. The critical lesson for anyone facilitating workplace mental health is that activity does not necessarily mean the outcome is being achieved. Buying a Stairmaster is of little value if it is not used regularly.

1. Obtain a workforce

mental harm risk profile

—Obtaining a baseline using a simple tool like the [Q¹⁵ Mental Health Harm Risk Profile](#) can help employees and employers understand the mental health harm risk based on employees' experiences over the past 30 days. This risk profile asks employees how they are doing and provides them with feedback and recommendations. The higher the mental health harm risk profile, the higher the likelihood that employees

may experience mental or psychological injuries that can increase workers' compensation and other disability claims. This risk profile can help employers understand employees' experiences that can increase their risk of burnout and other stress-related concerns like

It is beneficial to understand current risks, factors contributing to risk, and the percentage of the workforce languishing and flourishing, as well as to search for evidence of programs doing what they should be doing.

isolation, loneliness and maladaptive coping. It can take time to change a system, so it is prudent to encourage employees to engage in help-seeking behaviours to mitigate the risk of disability claims.

2. Discover what issues or factors create

drains—Ask employees to share their workplace experiences to help reveal psychosocial factors that are chargers and drains. When choosing a workplace assessment, employers should be clear on what outputs they want to know about. [Research](#) shows that it is helpful to understand psychosocial factors and hazards and how psychologically safe leaders and teams are. OHS risks such as bullying

and harassment, the value of existing programs, and how employees perceive that they are resilient and flourishing should also be discerned. Using evidence-based, anonymous workplace assessments can help employers determine what may be protecting workers from mental harm or putting them at risk. The challenge with many workplaces is not what they are doing. How they are doing it often creates strain and stress.

3. Inquire about what can be done and how it can support employees' experi-

ence—Asking employees this question helps employers understand through a workforce lens what they think could improve the employee experience. Though workplace mental health committees can provide input, they often are limited to a few voices. Employers

can take a qualitative approach by arranging focus groups where employees feel safe sharing ideas and opinions. These groups dig into employees' experiences and seek solutions. For example, if question one found that many employees are at risk of mental harm and question two confirmed workload is a significant drain, leveraging a work redesign would look for what could be done to reduce workload stress, perhaps by eliminating useless meetings or allowing more flexibility for employees to work from home. Focus groups encourage listening, asking open-ended questions and engaging employees in conversations to create solutions and ideas that may not otherwise have been considered. Based on the data collected from all three questions, this step aims to determine what actions can be taken to prevent mental harm, ensure mental health supports are accessible and in place, and guide operational decisions that can influence the employee experience regarding what is being done and how. For example, the data collected may highlight the benefits

of challenging a policy or red tape that can free up mental energy.

4. **Build and launch a workplace mental health game plan**—The first three steps increase awareness and accountability. This step moves from ideas and discussion to action. Regardless of the plan, provide for [resistance](#) and build a [workplace mental health scorecard](#) to measure output via a Plan-Do-Check-Act approach. Workplace mental health game plans promote accountability, learning and habits. I use what I learned from my dad: a stove has four burners, so you can only have so many pots cooking at once. I have taken this into my consulting and coach employers that less is more. It is better to do a few things well and achieve impact. One challenge often not considered in implementing workplace mental health game plans is they are designed to work in an organization that likely already has many things going on. Hence, creating space for impact requires being realistic and accepting that changing habits is a process, not an event.



Is pre-planning part of your workplace mental health program design?

As more organizations move towards creating psychological health and safety initiatives and designing and implementing workplace mental health programs, pre-planning is often forgotten or not considered.

When I ask an individual or an organization's mental health committee where they start to build a mental health program, I often hear something like, "We begin with a workplace assessment to understand the psychosocial factors and hazards better and sometimes conduct focus groups to collect data directly from the employees."

When I ask why they start with an assessment, the typical response is, "To obtain data that helps us determine risks and opportunities to inform the workplace mental health plan design and determine the programs, initiatives, and activities we will implement."

This seems reasonable on the surface. However, after working with hundreds of clients, it's become clear to me that there is great benefit in pre-planning before collecting data or investing energy in designing a workplace mental health program. Pre-planning provides context on vital criteria that inform a program's design and potential impact.

All psychological health and safety initiatives can be categorized into prevention (i.e., prevent harm and risk) and support (i.e., assist a need). Prevention activities can include creating a safe and respectful workplace policy and training employees to mitigate the risks of bullying, harassment and workplace violence, which can traumatize the persons exposed. Meanwhile, support ac-

tivities like providing \$3,500 for psychological services through a benefits plan can help a person experiencing a concern such as trauma or stress.

INTRODUCTION TO PRE-PLANNING

Pre-planning aims to help understand limits and set expectations to influence a workplace mental health program's design. Psychological health and safety programs provide information, knowledge, and skills that allow for habit development to promote and protect mental health.

Psychological health and safety (PHS) programs, like OHS programs, focus on prevention.

OHS leading indicators (i.e., safety meetings) can reduce the risk of lagging indicators like near misses and accidents. Similarly, PHS programs encompass leading indicators such as psychologically safe leaders who mitigate the risk of lagging indicators like disability leaves.

When individuals or organizations with workplace mental health programs cannot answer the following questions, it indicates why they may not be getting the desired outcomes. For example, lead indicators can predict why desired outcomes of lower disability claims and faster returns to work are not occurring.

Answers to the following questions will vary from one organization to the next. Moving towards evidence-based workplace mental health programs requires moving the conversation from random acts of wellness to instituting controls and expectations to planning, facilitating, measuring and defending the value of investments.

WORKPLACE MENTAL HEALTH FUNCTION OWNER

Who is accountable for the workplace's mental health function? What percentage of their time is spent on this function? What is their role description? Who do they report to? How are they evaluated?

These are examples of the questions I typically ask to understand the level of accountability an organization has established. Pre-planning ensures these answers are clear.

If a workplace mental health committee exists, how much time are members given each month to put into committee work? Is this a priority or optional, and how is their involvement evaluated? The goal is to set clear accountabilities for who will be doing what, when, and to whom this function is accountable.

ORGANIZATION'S MATURITY OF WORKPLACE MENTAL HEALTH DEFINED

Senior leadership's buy-in and expectations for workplace mental health and psychological safety, health and inclusion determine if an organization is ready to engage in workplace mental health programs. The function owner's enthusiasm does not matter if they lack the senior leadership team's support or if workplace mental health is not seen as critical for the organization's success.

The organization's maturity level will inform where to start. For example, if senior leadership has not fully bought in, provide them with training, the business case for workplace mental

health, and its value so they understand how workforce mental health costs and productivity are linked. Do not assume they already understand how poor mental health statistics relate to the organization's performance.

HOURS PER FULL-TIME EMPLOYEE (FTE) TO ENGAGE IN WORKPLACE MENTAL HEALTH INITIATIVES

Never assume employees have time in their schedules or feel they have permission to participate in an initiative. Be specific when asking if

employees can engage in programs to develop habits like mental fitness to build resiliency and how many paid-time hours per year they are allowed.

The answer should not be, "It depends."

Suppose the leadership development and training budget is two days. The question that must be asked is how many hours of curriculum can be covered, and how many hours will be allocated to follow-up and practice? Most adult learning programs provided to employees never correct for the forget-

ting curve, which means there is little retention or new habit formation after the training.

Expecting employees to participate in mental health prevention programs over their lunch breaks or on evenings or weekends is ineffective.

BUDGET PER FTE AVAILABLE TO SUPPORT WORKPLACE MENTAL HEALTH INITIATIVES

Besides benefits and employee and family assistance plans (EFAPs) that can cost employers anywhere from \$3,000 to \$5,000 per employee, defining the workplace mental health budget per FTE is critical. I often ask during pre-planning if the

Senior leadership's buy-in and expectations for workplace mental health and psychological safety, health and inclusion determine if an organization is ready to engage in workplace mental health programs.

employer is aware of the [costs per FTE](#), such as disability, sick time, turnover, conflict, presenteeism, and errors due to mental illness. Most do not know. However, with some simple math and assumptions, it is relatively easy to estimate the costs. This activity helps employers realize that in most organizations, the price per FTE is much higher than the current investment in mental illness prevention, plus any new investment to prevent mental health concerns.

The ratio is typically about \$8 for every dollar spent.

I suggest the goal for the employer is to close the ratio gap. Senior leaders need to understand the financial costs of maintaining mental health and the potential value of investment. Preplanning allows time to understand what budget per FTE will be required to have an impact.

SUCCESS METRICS AND PROGRAM EVALUATION COMMITMENT

Research has found many employers launching workplace mental health programs have not designed a scorecard or thought about what success looks like, and they have no budget or clarity on how to measure and evaluate a program.

A Plan-Do-Check-Act approach requires discipline, budget and resources. The Plan and Do seldom are enough. The learning and accountability happen in the Check and Act phases.

Before purchasing a program or investing time in delivering one, an employer should discuss the resources and time that will be allocated to program evaluation. For example, if 100 managers are trained in a two-day workshop for 16 hours at \$100 per hour (including overhead), the total salary cost is \$170,000. This does not

consider lost productivity.

Pre-planning allows space to consider what will and will not be done to measure success and why.

ANTICIPATE AND PLAN FOR RESISTANCE

Planning for detractors and resistance is critical in change management.

Workplace mental health programs require two-way accountability. An employer funding a program, leaders role modelling and promoting it, and employees engaging and practicing all predict a program's success.

Workplace mental health programs aim to develop habits that support a positive employee experience. Information is helpful but useless if it does not create change and new habits.

Awareness, accountability and action comprise a three-step model I have used for many years.

Planning and being aware of [resistance and challenges](#) to implementing any program can help with staging communication. Begin with pilots to learn how to implement and determine what incentives, rewards and communication tactics work. Consider the stakeholders (e.g., unions) who may be barriers or missed advocate opportunities if not respectfully and adequately engaged.



Shortcut for creating a psychologically safe workplace: Key performance behaviours

Key performance behaviours (KPBs) in the psychological safety context facilitate positive interpersonal interactions. KPBs can be described as leaders' and workers' intentional and habitual behaviours that promote positive interpersonal interactions, like acting civilly to each other, protecting and promoting mental health and creating psychologically safe workplaces.

Every employee's interaction in the workplace is an opportunity to experience positive or negative emotions. Employers must accept that psychological safety protects workers from emotional harm while helping them develop self-protection skills like mental fitness and help-seeking behaviours.

Employees' day-to-day experience in the workplace and home environment matters as it can impact their stress levels. Like when an employee dreads interactions with their direct leader because of fear or in a less-than-optimal emotional state. Or an employee who is experiencing domestic violence can come to work traumatized, which impacts their emotional well-being.

The evolution of the fight (attach) or flight (retreat) response system, working 24/7 to protect us from harm, was one reason humans became the dominant species. In modern society, people may also freeze or fawn (be overly agreeable) when faced with fear. Constant exposure to stressors and activation of the fight-or-flight response can create mental harm, as can single traumatic events.

HOW EMPLOYERS TRADITIONALLY PROTECTED WORKERS

Many of today's employers are motivated to protect workers by using a traditional approach to cre-

ating a mental health plan. The problem is that many plans do not adhere to OHS lead practices regarding a Plan-Do-Check-Act approach to ensure what is being done is working and to define the most desirable KPBs and habits required to protect and promote employees' well-being.

Often, the traditional approach is to create a mental health policy to signal workers that the employer cares about their mental health. This approach is followed by programs and policies that typically include an assessment to get a psychosocial risk factor baseline and programs to support employees struggling with mental health concerns. Those efforts include employee and family assistance programs, access to psychological services through extended benefits, leadership development, anti-stigma campaigns and resiliency courses.

While all these initiatives may appear proactive, information is useless if it does not create the desired KPBs and habits that protect and promote workers' mental health. A psychologically healthy and safe workplace's primary goal is to facilitate and maintain a psychologically safe culture where all workers and leaders believe:

- They feel welcomed, included, and belong.
- The employer cares about their learning and growth; making mistakes is part of the process.
- The employer values their contribution.
- It is safe to speak their mind without fear of retaliation or career damage.
- It is OK to challenge the status quo, and new ideas are appreciated.

ADOPTING A KPBs APPROACH

Psychologically safe facilitators (PSFs) are more effective when they have the [core competency](#) and skills to facilitate workplace mental health. Those who adopt the critical success factor of an evidence-based approach committed to ongoing auditing and measuring are positioned to facilitate KPBs and protective habits that reduce mental harm and promote mental health. Employers and PSFs must ensure that all KPB programs and policies are reinforced within the context of psychological health and safety.

Considerations to help PSFs move toward a KPBs approach:

- **Set expectations for KPBs.** Determine what kinds of KPBs the employer wants to promote and reinforce, like the top five behaviours required in their culture to be a psychologically safe leader and team player. Be specific and ensure these align with the organization's values. This takes work and engaging key stakeholders. It is critical as it shapes and reinforces a psychologically safe culture by promoting habits that matter.
 - **Discover drains and chargers.** Understand what psychosocial factors are charging and draining workers and leaders. For example, work demand is a charge when it feels right and a drain when it feels overwhelming. The drain's frequency, duration, and intensity can predict the risk of psychosocial hazards like stress, fatigue, and distraction that can impair workers' judgment and potential, resulting in physical or psychological harm to themselves or others.
 - **Protective factors gameplan.** Determine what protective factors will be implemented to mitigate mental harm and promote mental health. Be clear on the information, desired KPBs, and habits for every program and policy.
- Sending workers to programs without a plan to reinforce learning, correct for the forgetting curve and create habits will often be perceived as activity-based versus impact initiatives. Protective factor habits aim to protect and promote desired outcomes to support emotional well-being, a critical factor for predicting mental harm, injury and risk of illness.
- **Confront barriers head-on.** Facilitating KPBs and desirable habits is challenging if employees do not feel safe participating or understand their value. Before engaging in programs, one critical step is to work with workers and leaders to understand what [barriers](#) (e.g., stigma, privacy concerns) must be addressed. Employers must recognize that inclusion is not linear; it is complex. How workers show up and experience the workplace depends on the intersection of gender identification, sexuality, ethnicity, age, neurodiversity status and mental health. Understanding what programs and policies protect and support workers requires a deep acknowledgement of differences to ensure they are delivered with equity.
 - **Link critical KPBs to relevant key performance indicators (KPIs) and organizational goals.** Be clear on how each critical KPB can benefit employers' and employees' experiences. Map the desired KPIs and outcomes for every KPB. This can be done with leaders, teams, and employees. It does not need to be complex; it must be transparent, reinforced and measured. For example, the help-seeking KPB can get workers the support they need early to reduce lost time due to sick days, which can drain the organization's potential to achieve its performance results and disability management costs. All critical KPBs are protective factors that promote mental health and reduce mental harm.

Leveraging work redesign to facilitate psychological safety

Psycho-social Health and Safety (PHS) guides employers in influencing the workplace environment to increase its opportunity to be emotionally and physically safe. Employees typically refer to a psychologically safe workplace as welcoming and giving them a sense of belonging. When done well, the benefits of PHS are that it can enhance employees' morale, well-being, engagement, and productivity. An effective PHS program aims to reduce costs and establish programs, policies and procedures that minimize the risk of harm and create a more resilient workforce.

TOP OF FORM ORGANIZATIONAL SOLUTIONS

In today's fast-paced and complex world, employers face numerous challenges that can drain employees' energy, morale and productivity. When business pressures lead to increased workloads, organizations and individuals experience strain. While individual employees may feel the immediate effects of increased stress and mental health challenges, these issues often signal the need for broader organizational changes rather than individual interventions.

An effective PHS program monitors psychosocial risk factors and hazards to mitigate mental harm and promote mental health at organizational and individual levels. When psychosocial risk factors act as hazards, employers must recognize that controlling those hazards will typically require systemic organizational re-design changes to the environment or how work is done rather than focusing on building workers' resilience. While supporting individual workers is essential, organizational-level interventions can often have more substantial and lasting

impacts.

Work redesign is a PHS tactic that addresses the causal and contributing factors at the organizational level. Unlike individual-focused interventions, redesign can help control or mitigate identified psychosocial risk factors (e.g., work demands) that have been identified as causing harm or put in place before they become hazards that affect the entire workforce (e.g., widespread burnout). This approach acknowledges that workplace mental health challenges often stem from systemic issues rather than individual shortcomings.

Consider a hospital's division, which has four shifts of 10 health professionals working 12-hour shifts while consistently short 3-4 employees serving a patient load at 120 percent capacity. If staffing levels and workloads do not become manageable, it can be expected that Team A members will be at increased risk of burnout, increasing the risk to employees and patients. Sending this team to a resiliency workshop with no consideration for improving their current work demands will likely result in little tangible benefits.

STEPS FOR FACILITATING PHS REDESIGN

Redesign work requires employers to influence organizational and environmental factors within their control. They should adhere to a Plan-Do-Check-Act approach to ensure the redesign intervention is measured and necessary changes improve outcomes.

STEP 1: IDENTIFY RISKS AND OPTIONS

Recognizing the causal and contributing factors leading to psychosocial drains and harms is critical

to avoid focusing on symptoms. This step involves a comprehensive assessment by engaging the key stakeholders (i.e., leaders and employees) to understand the challenges contributing to the psychosocial risk factor.

A workplace fostering open, honest, and effective communication encourages employees to share their ideas and concerns while feeling safe and secure participating. This can be done with surveys, focus groups, or one-on-one communication. It's essential to create opportunities for staff to discuss the challenges they face in their roles. By inviting their feedback and exploring potential adjustments, employees can contribute to work redesign conversations that help protect them from mental harm. Employee discussions can offer valuable insights into innovations and resources to manage identified psychosocial risk factors or hazards.

Actions:

- Have a system that monitors potential drains through workplace assessments, pulse checks, focus groups and interviews.
- Understand the consequences and risks if the drains are not addressed to understand the magnitude of human capacity and financial costs (e.g., absenteeism rates, disability, burn-out turnover rates, job satisfaction scores).
- Engage stakeholders at all levels for diverse insights on options for how to control, mitigate or improve the situation.

STEP 2: REDESIGN PLANNING

Once the risks and options are on the table, redesign planning will require mapping out a plan for how the employer can improve the situation. This step involves deciding what can and cannot be done in the short, mid and long terms. When determining the available options, budget, capacity and timing are challenges that leadership must deal with. It is vital that when considering cost, employers fully understand the financial cost of doing nothing (e.g., an increase in STD and LTD claims).

Example options:

- Implement targeted interventions to address specific drains (e.g., rebalance workloads and increase staffing levels).
- Provide employees with enhanced autonomy over tasks and schedules to empower decision-making.
- Offer flexible work arrangements (remote, hybrid) and the necessary tools to support diverse setups.
- Streamline processes to eliminate inefficiencies and utilize automation where possible.
- When planning changes, employers need to consider several key items, such as financial and other resources, how to help workers adjust to changes, what steps to take first and how to measure if the changes are working well.

STEP 3: IMPLEMENT, MONITOR, AND IMPROVE

The check is often overlooked in the PDCA model. A critical part of this step is keeping communication lines open with key stakeholders' feedback. This step focuses on implementing changes and, once implemented, monitoring their impact and being adaptable to further improvements based on employee and organizational feedback.

Actions:

Ensure all employees know the why, what, and how of any redesign intervention before launching or piloting.

Launch pilot projects to test new work redesign interventions to gather feedback for refinement before scaling when possible.

Clearly define key performance indicators (KPIs) and employee feedback to measure the impact of the work design.

Section 2

Facilitating psychological health and safety

The importance of psychological health and safety (PHS) in the workplace has become increasingly evident, especially as organizations navigate the complexities of mental health challenges. Employers must actively facilitate psychological health and safety to foster an environment where employees feel safe and supported. This summary outlines essential considerations for creating psychologically safe workplaces and emphasizes the benefits of implementing effective strategies.

Creating a psychologically safe workplace begins with fostering a culture prioritizing mental well-being. Employers should be transparent in their commitment and encourage open dialogue among employees. Regularly assessing workplace experiences through surveys, focus groups or pulse checks can help organizations identify areas needing improvement. Engaging employees in candid discussions about their mental health can empower them, instilling confidence and a sense of ownership over their work environment.

Employers must invest in training for individuals responsible for facilitating workplace mental health initiatives. These trained facilitators, often referred to as Psychological Safety Facilitators (PSFs), should possess a strong understanding of psychological health, including the distinctions between mental health, mental harm and mental illness. Training should incorporate evidence-based practices, enabling facilitators to create tailored strategies that address the organization's and its employees' unique needs.

Encouraging professional development for PSFs ensures they have the skills and knowledge to implement PHS programs effectively. Utilizing standards such as the CSA Z1003 Psychological Health and Safety Standard can help organizations establish a framework for assessing and improving their mental health strategies.

IMPLEMENTING A STRUCTURED APPROACH: THE PDCA MODEL

Employers should adopt a structured approach like the Plan-Do-Check-Act (PDCA) model to facilitate psychological health and safety. This cyclical process enables organizations to evaluate their initiatives continuously, assessing what is working and what is not. Employers can make informed decisions about which programs to pursue by focusing on data collection and analysis, ensuring that resources are allocated effectively.

1. **Plan:** Identify specific goals and areas for improvement within the workplace mental health strategy. This involves gathering data and understanding employee experiences.
2. **Do:** Implement changes and initiatives to enhance psychological safety, ensuring employees are informed and engaged throughout the process.
3. **Check:** Regularly evaluate the impact of implemented programs. This could include measuring employee satisfaction, engagement and the effectiveness of mental health resources.
4. **Act:** Based on the evaluation, make necessary

program adjustments, continually refining strategies to enhance psychological health and safety.

PROMOTING EMPLOYEE INVOLVEMENT AND FEEDBACK

Employee input is vital for successfully facilitating psychological health and safety. Organizations should create mechanisms for workers to provide feedback on their experiences and suggestions for improvement. Engaging employees in decision-making fosters a sense of belonging and ownership, leading to more effective outcomes.

Creating forums where employees feel comfortable sharing their thoughts can reduce the stigma associated with mental health discussions. Employers must ensure these channels are accessible and encourage honest conversations without fear of retaliation.

BENEFITS OF FACILITATING PSYCHOLOGICAL HEALTH AND SAFETY

- **Enhanced employee well-being:** Prioritizing psychological health leads to increased job

satisfaction, reduced stress and improved mental resilience among employees.

- **Reduced absenteeism and turnover:** Organizations that actively promote PHS experience lower rates of absenteeism and turnover, saving costs associated with recruitment and training.
- **Boosted organizational performance:** A psychologically safe workplace fosters creativity and innovation, enhancing overall productivity and achieving better business outcomes.
- **Stronger team dynamics:** Focusing on psychological health strengthens employee relationships, promotes collaborative environments and encourages open communication.

Facilitating psychological health and safety is essential for creating a supportive work environment that promotes employee well-being and enhances organizational performance. Organizations can cultivate a culture where mental health is prioritized and every employee feels valued by implementing structured approaches, investing in training, and actively engaging employees.



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Why employers urgently require team members trained and competent in workplace mental health and psychological health and safety

On a scale of 1 (low) to 10 (high), how concerned is your organization about workplace mental health?

Regardless of your score, the more important question is, why did you pick that number?

I often ask these questions and press someone to challenge the respondents' beliefs. My observation is many organizations' approaches to workplace mental health are missing clarity and attention on why they are acting and have significant gaps in how they implement and measure programs' success. The focus appears to be on planning and doing with little effort or accountability on checking if what is being done is achieving the desired outcomes (i.e., habits). Information is useless unless it transforms into habits that protect and promote employees' mental health.

Success appears to be defined by random acts of wellness (e.g., check-the-box approach) and outsourcing mental health support for employees experiencing mental health challenges. Missed opportunities are a lack of attention, focus, and clarity on facilitating behaviours and habits to mitigate and prevent the risk of workplace mental harm and help employees [flourish](#).

OHS traditionally has focused on preventing physical harm to employees. OHS teaches that the environment and how employees do their work can predict employees' risk of accidents and bodily injury up to and including death. Its success depends on employers and employees promoting a two-way accountability approach.

Many employers are confused about psychological health and safety (PHS), but it is not a complicat-

ed concept when put into context. PHS focuses on employees' emotional well-being, not clinical mental illness. Although PHS practices can prevent mental illness, their primary focus is on employees' emotions. Like OHS, PHS acknowledges the environment can only do so much. Employees must care for their mental health to flourish.

PHS can be predicted by employees' work experiences, such as interpersonal interactions, equipment, temperature, and work organization. Any of these psychosocial factors can positively or negatively impact employees' stress levels and emotional well-being.

PHS teaches the environment can help employees care for their mental health by practicing mental fitness. Employees who report to work feeling emotionally overwhelmed are at more risk of mental harm, injury, and illness than peers who feel charged (i.e., flourishing).

Workplace mental health and psychological safety is a growing topic because of legislative changes, human rights complaints, employee conflict and turnover and union arbitration cases linked to mental health.

While many organizations reap benefits by investing in workplace mental health, others see no positive change in workplace mental health and experience higher costs. Some employers fail to achieve outcomes because of knowledge gaps in facilitating psychological health and safety, a lack of clarity on success and the lead indicators that predict it.

I recommend that all employers consider PHS like any other specialty, such as HR or OHS. Competency requires training by applied and proven experts

who work with employers to facilitate PHS strategies and programs.

Well-executed PHS programs position organizations for current and future success by promoting and protecting employees' experience and increasing attraction, retention and flourishing. I suggest my clients add a flourishing KPI to their HR scorecards beyond turnover, harassment, and disability data that report the percentage of the workforce flourishing and languishing as a lead indicator of workforce sustainability.

PREPARING TEAM MEMBERS TO DEVELOP PHS COMPETENCIES

Many employees assigned to facilitate workplace mental health have a passion, and some have relevant lived experiences. However, being passionate does not make someone competent to facilitate a Plan-Do-Check-Act (PDCA) evidence-based program to prevent and support workplace mental health. Nor does it provide credibility to influence senior leaders on PHS's strategic benefits, such as how it can help retain tacit knowledge and talent, increase productivity, and lower presenteeism, disability claims, and turnover.

In *Introducing one [missing competency gap](#) for facilitating psychologically safe workplaces*, I asked psychologically safe facilitators (PSFs) what they believe the core competencies of any employee or volunteer assigned to spend 5 percent to 100 percent of their time on workplace mental health are for facilitating psychological health and safety within their workplace. That article provided 20 self-evaluation items for PHS facilitators to evaluate their competency.

There currently are no professional standards or guidance to be an effective psychological health and safety facilitator. As a result, employers risk buying [snake oil](#) products and programs that lack scientific foundation and could cause harm.

The CSA Z1003 Psychological Health and Safety Standard promotes the North Star of what employers can do to create psychologically healthy and safe

workplaces by leveraging a PDCA approach. The Standard does not mandate one action because there are many variables, such as the employer's size, budget, resources and PHS facilitators' competency and maturity in implementing psychological health and safety.

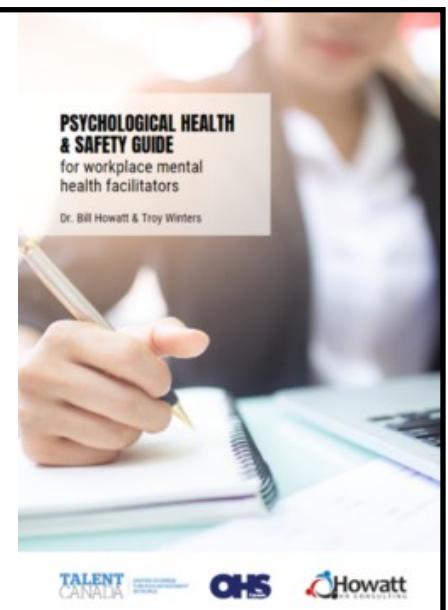
FACILITATING PSYCHOLOGICAL HEALTH AND SAFETY

I promote the value of professional training for PHS facilitators and leveraging evidence-based frameworks that support PDCA approaches that can be adapted to organizations' needs and situations.

The three-step D³ Model for Psychological Health and Safety aims to reduce mental harm and promote mental health. Each of the three D's: 1) Discovery (e.g., exploring what is known and not known regarding existing supports for workplace mental health), 2) Data collection (e.g., understanding employees' experience by engaging them to determine where to begin), and 3) Deciding, framing and implementing (e.g., establishing the game plan that fits your organization's readiness, resources and budget). This model aims to clarify what to do, how and where to begin.

For a detailed overview of the D³ Model, visit our website and download the *Psychological Health & Safety Guide for Workplace Mental Health Facilitators* by clicking here: <https://www.howatthr.com/>

This research brief is a user-friendly guide for leveraging this tool to decide where to focus energy and resources to facilitate an evidence-based workplace mental health strategy and program.



One missing competency gap for facilitating psychologically safe workplaces

A growing movement sees employers creating psychologically safe workplaces, much like the modern-day universal corporate initiatives of inclusion, diversity and employee engagement. Many employers would never want to be viewed by their current and future workforce as not caring about such issues.

A critical objective for creating a psychologically safe workplace is driving accountability and learning for all workers and leaders to reduce mental harm and promote mental health. Flourishing workers are more likely to show up each day because they want to work with a sense of belonging and purpose than languishing workers.

If your employer cares about psychological health and safety and workers' mental health, they must know how to create a culture where all employees feel welcomed, have a sense of belonging and purpose, and feel safe to speak up without fear of retaliation or retribution.

The CSA Z1003 Psychological Health and Safety Standard promotes the North Star for what employers can do to create psychologically healthy and safe workplaces by leveraging a Plan-Do-Check-Act (PDCA) approach.

Both *ISO 4503 Occupational Health and Safety Management—Psychological Health and Safety at Work—Guidelines for Managing Psychosocial Risks* and *U.S. Surgeon General Releases New Framework for Mental Health & Well-Being in the Workplace* provide recommendations for employers.

Many employers wanting to adopt or adapt any

of the Standard's guidelines, ISO or Surgeon General recommendations need to be clear on how to proceed. Individuals who have been designated or volunteer typically facilitate workplace mental health. Many do not have credentials or formal educational backgrounds; they are self-taught. The risk is that individuals will make decisions without the knowledge and skills to maximize the available budget and resources.

HOW PREPARED ARE YOUR PSYCHOLOGICALLY SAFE FACILITATORS?

Psychologically safe facilitators (PSFs) are persons assigned or who volunteer to spend 5 percent to 100 percent of their time on workplace mental health. A PSF can be an HR or OHS professional, union member, worker, leader from any level, an external subject matter expert or a consultant supporting the organization.

PSFs' primary role is to facilitate workplace mental health strategies, programs, policies, and initiatives that the employer supports to mitigate mental harm and promote mental health. They typically do this through implementing and facilitating programs and policies to offer resiliency training or support an EFAP.

MISSING COMPETENCY GAP FOR CREATING PSYCHOLOGICALLY SAFE WORKPLACES

The level of knowledge and skills in those assigned to facilitate psychologically safe workplaces and mental health (i.e., PSFs) is a core competency gap in creating psychologically safe workplaces. Information on what employers can do is

available. However, training and guidance are lacking. Work Safe Prevention Services (WSPS) of Ontario invested resources to create a framework to help PSFs proactively protect and promote workers' mental health, regardless of their size, sector, budget or resources.

One lesson observed in the development of the WSPS Roadmap over the past two years is the benefit of providing PSFs with knowledge and skills to develop their confidence and core competency in facilitating psychological safety.

This observation was strengthened upon reviewing the results of a recent CSA study, which showed that more employers are addressing workplace mental health with planning and doing. However, there are gaps in measuring or checking what is and is not working. This may be partially explained by a lack of awareness of the benefits of implementing a PDCA approach.

The workplace environment impacts employees' experience and mental health. This suggests that having PSFs trained and prepared to lead effectively and facilitate the resources available is good for business, protects workers and helps them flourish.

SELF-REFLECTION QUIZ

The self-reflection quiz on the next page will allow you to evaluate your confidence in facilitating psychological safety in your workplace.

For each item, rate your confidence on a scale of 1 (low) to 7 (high) in your PSFs' knowledge, skills and competency. The higher the score, the more confidence you have in their ability to facilitate psychological safety and workplace mental initiatives.

HOW DID THEY DO?

Many PSFs have not been developed or trained and are unaware of what they do not know. Employers can use training, knowledge and skills to move their PSFs along a learning continuum. Employers and PSFs should seek training to mature and move psychological safety along as a profession through a credentialing process.

Through training and mentoring, PSFs can obtain the knowledge and skills to improve their ability to facilitate and move workplace mental health towards an evidence-based, continuous improvement versus a check-the-box approach.

Employers are encouraged to budget dollars for internal capacity building to help their PSFs obtain knowledge and skills to make evidence-based decisions. For workplace mental health to have an impact, employers must move from information sharing to habit creation, which is at the core of OHS management systems that promote ongoing learning, continuous improvement and corrective action.

Self-reflection Quiz

The following self-reflection quiz will allow you to evaluate your confidence in facilitating psychological safety in your workplace.

For each item, rate your confidence on a scale of 1 (low) to 7 (high) in your PSFs' knowledge, skills and competency. The higher the score, the more confidence you have in their ability to facilitate psychological safety and workplace mental initiatives.

Item	PSFs' core competency evaluation	Item Score 1 to 7
1	Can they explain psychological health and safety and have a solid foundation in global trends and lead practices?	
2	Can they articulate the differences between mental health, mental harm, mental injury, and mental illness, including substance use disorders and neurodivergence?	
3	Can they articulate what workplace assessments and audits are for and how to conduct them?	
4	Do they understand a trauma-informed workplace and the employer's role in providing support?	
5	Can they articulate current suicide research and the roles of employers, leaders and employees in preventing death by suicide?	
6	Can they determine what protective factors can prevent mental harm and promote mental health in the workplace?	
7	Do they understand how to align psychological safety with diversity, inclusion, and equity initiatives?	
8	Can they influence senior leadership to get their buy-in and involvement?	
9	Can they define the types of data (quantitative and qualitative) required to design a mental health game plan that fits the employer's needs and budget and promotes psychological safety?	
10	Do they understand impairment in the workplace context and what employers must do to mitigate it?	
11	Can they identify psychosocial charges and drains and the most concerning psychosocial hazards?	
12	Do they understand the types of workplace mental health policies that support psychological safety?	
13	Can they adopt or adapt the CSA Z1003 Standard or implement a Plan-Do-Check-Act approach that supports building an evidence-based workplace mental health game plan and scorecard?	
14	Can they effectively operationalize workplace mental health by budgeting, resource planning, communications strategy, reporting, facilitating a mental health workplace committee or partnering with work-safe committees and OHS?	
15	Can they identify barriers beyond peer, self and organization stigma that impede workers' participation in workplace mental health initiatives?	
16	Do they know how to design and implement workplace mental health prevention and support programs using adult learning lead practices that correct the forgetting curve and facilitate habit development and program adherence?	
17	Do they know how to align key performance behaviours (KPBs) to targeted key performance indicators (KPIs) that predict desired outcomes?	
18	Do they understand how to conduct value of investment (VOI) and return on investment (ROI) calculations and reporting?	
19	Do they understand how to manage change and facilitate corrective action within the context of psychological safety?	
20	Do they understand how to validate the credibility of external programs (e.g., digital mental health apps) before purchasing?	
Total Score (Range 20 to 140)		

The dark side of the psychological health and safety conversation

These days, more employers positively impact employees' experiences through psychological safety and inclusion practices. However, when asked if more employees use psychological safety as a sword versus a shield, many employers answer “yes.”

They report employees blame others to avoid conflict instead of taking responsibility for failing to fulfill reasonable work commitments and expectations. When challenged to take accountability for their behaviour, they make statements like “I don't feel psychologically safe” to shift the focus and blame.

When an employee raises a concern about how they feel, a leader should listen without judgment, take the issue seriously, and focus beyond their emotions to the behaviours. Skipping this fact-finding step can increase the risk of facilitating the dark side of the psychological safety and inclusion conversation by forming the perception that employees can no longer be held accountable for their behaviour.

Leaders and HR professionals who focus on employees' feelings over facts increase the risk of creating power dynamics that can negatively influence how leaders make decisions and manage.

The literature continues to highlight workplace mental health programs that enhance psychological safety and inclusion to mitigate mental harm and promote mental health. Researchers [report](#) employees with low well-being are likely to develop mental illness.

Helping employees develop [resiliency](#) protects them from mental illness and motivates employers to invest resources to create and maintain psychologically safe and inclusive workplaces.

ADDRESSING THE DARK SIDE OF THE PSYCHOLOGICAL SAFETY AND INCLUSION CONVERSATION

Nowhere does it say holding employees accountable means they must always feel good. People tend to be frustrated when they don't get what they want, but employees can't always get what they want. Holding employees accountable for their behaviour requires the employer to focus on that behaviour. Trusted leaders who lay the foundation for a psychologically safe relationship anchor their and employees' roles for making decisions, providing feedback, debating points and correcting behaviour.

When this foundation is absent, leaders and employees risk struggling through challenging moments involving unpleasant emotions. Holding employees accountable does not necessarily require them to be comfortable, but it should not be punitive, demoralizing or abusive.

I am uncomfortable when my personal trainer pushes me to do 12 reps when I would rather stop at eight, but we are aligned with the value-based outcome of helping my health. I had to agree to the terms and roles of accountability for this relationship to work.

The dark side of psychological safety and inclusion is more likely to surface when employees,

leaders and peers lack clear guidelines for accountability, expectations and behaviours.

The dark side flourishes if implementation and facilitation regarding occupational health and safety (OHS) legislation are not managed. Most provincial and federal jurisdictions set expectations that employers have a policy and training on safe and respectful workplaces and a process for conducting investigations when complaints are made. The aim is to protect employees from bullying, harassment, sexual harassment, discrimination and workplace violence.

OHS legislation has been developed and implemented with good intentions. However, as it matures, another workplace phenomenon is occurring. A power shift is [significantly](#) impacting employees' and leaders' relationships, along with productivity and employees' commitment levels.

This [power shift](#) provides both positives and complications for leadership. Power shifts in workplaces that have not laid a solid foundation for psychological safety risk breeding behaviours and unhealthy habits that promote the dark side of psychological safety and inclusion.

Most OHS safe and respectful legislation clarifies that managers have the right to manage. The goal is to offset the dark side of psychological safety risks by inhibiting employees who do not want to do what they are asked from claiming they are being picked on or bullied. Another protection most policies mention is that making false allegations, such as unfounded or false complaints about another person, is unacceptable.

Unpleasant emotions can be expected when a leader challenges performance or holds an employee accountable for a workplace infraction. However, these emotions do not mean the employee is being bullied or not being treated with respect.

Employers can anticipate the psychological

safety and inclusion conversation's dark side by making maturity and accountability core pillars of psychologically safe and inclusive workplaces.

1. **Define a psychological safety and inclusion North Star**—Do not assume employees understand why the employer wants to create a psychologically safe and inclusive workplace. Ensure all employees know the bright and dark sides to illustrate why accountability and learning from mistakes are necessary for a psychologically safe and inclusive culture.
2. **Anchor accountability and roles**—Ensure employees clearly understand their roles, expectations, and how accountability will be enforced. Check in regularly to ensure employees know what success looks like and how they are being held accountable.
3. **Set clear consequences for faulty allegations**—Educate employees and ensure everyone understands their rights and the consequences of making false allegations to hurt others (i.e., sword). People's feelings do not give them the right to make false claims to get out of something or not take accountability for their actions. Remember to promote up-standing behaviours.
4. **Train leaders to become *trusted* leaders**—A psychologically safe leader who builds trusted and safe relationships mitigates the risk of employees who are corrected or challenged making unsubstantiated claims.
5. **Get facts before reacting**—Simply saying something does not make it factual. Thoughts are not always facts. Focus on behaviour, not emotions. It's reasonable for a person who does not want to accept accountability to place blame. Focus on the organization's values and move towards creating a culture that is caring, accountable and open to learning.

Why the concept of IDEA can fall short: Insights through a psychologically safe workplace lens

On a scale of 1 (low) to 5 (high), how confident are you that beyond posters, emails, colourful lanyards and offering annual diversity, equity and inclusion (DEI) training, all employees feel a sense of belonging in your workplace? What is the evidence for your response? If it's "what I think" or "my experience," that's not good enough.

One major challenge I notice more than I like when engaging senior leaders and employees in conversations about inclusion and psychological safety is the lack of awareness of the difference between perception and perspective. When people are stuck in their perception, they lose the opportunity for humility needed to discover their implicit bias (i.e., unconscious attitudes and beliefs).

In this same conversation, I often notice that what leaders believe promotes DEI is nothing more than optics and a check-the-box routine. There is no measurement or structure for a meaningful review and program impact evaluation until senior leadership becomes aware and understands how subtle and damaging oppression is for maintaining the status quo. It does this by not seeking to understand marginalized groups' experiences, having a lens for noticing, or — even worse — unconsciously dismissing or belittling others' experiences, thoughts, and emotions.

OVERT AND COVERT DISCRIMINATION

Marginalized groups, including women, employ-

ees with disabilities, LGBTQ+ persons, employees of colour, employees with neurodivergence or mental illness, including all forms of addictive disorders, or who live in a lower socio-economic status typically make up a significant percentage of a workforce.

Overt and covert discrimination drives marginalization. Examples are workplaces where leaders, from the CEO to frontline managers, are blind to behaviours that drive fear, isolation, and silence, such as micro-aggressions, gaslighting, intentional isolating, taking credit for others' ideas, and making assumptions based on stereotypes.

Inclusion, diversity, equity, and abilities/accommodation (IDEA) remain aspirational and often fall short because employees fear speaking up, questioning, or challenging discrimination. There is also a lack of literacy within most workforces regarding what IDEA means. Although inclusion and diversity are interconnected concepts that are by no means interchangeable terms, inclusion is how well different groups within a workforce feel they belong and are valued and welcomed. Diversity focuses on the representation of various groups within an organization. Key IDEA objectives are removing barriers and recognizing the benefits of ensuring all employees feel equally involved and supported in all workplace areas.

A recent study completed in partnership with Dr. Lee-Baggley & [Associates](#) using the *Workplace*

"We will all profit from a more diverse, inclusive society, understanding, accommodating, even celebrating our differences, while pulling together for the common good."—Ruth Bader Ginsburg

Psychological Safety Assessment ([WPSA](#)) approved by SMU Research Ethics Board involved 3781 participants. We examined the participants' Inclusivity Workplace Scale (IWS) of seven inclusion items that can also be found in the *Perceptions of Workplace Inclusion Quick Survey* role.

We learned that there is a significant statistical experience difference between two groups of employees. Employees with lower inclusivity levels reported less desirable workplace experiences.

The analysis provided evidence of the importance of employees' perception of feeling welcomed, safe, belonged, respected, valued, heard, or understood. The relationship analysis of employees' inclusivity levels predicted their experience. Employees with low inclusivity levels were at more significant risk of experiencing incivility, bullying, and harassment. They were more likely to be negatively impacted by workplace psychosocial risk factors, report lower resiliency levels, and be at more risk of mental harm due to psychosocial hazards and go on short-term disability due to mental illness.

This study suggests that employers will never fully obtain the IDEA potential until there is a solid, psychologically safe foundation where fear and silence have been removed. A psychologically safe foundation promotes a culture that holds people accountable for their behaviours and allows them to learn and grow from mistakes without fear, judgment, or adverse consequences.

KEY PERFORMANCE BEHAVIOURS

Examples of key performance behaviours (KPBs) that employees and leaders can demonstrate include listening with empathy and compassion and allowing and encouraging challenging and debating ideas. Success is when all employees feel safe to speak their minds without fear of retribution or retaliation. This does not mean leaders must agree or employees can do whatever they want.

Psychological safety is not an idea or philosophy or about what an employer is doing. It is about why they are doing it and decisions and behaviours that directly impact the employee experience, such as how work is organized, interpersonal interactions, working conditions, and equipment provided to employees. Command-and-control leaders who talk at their teams create different emotions than trusted leaders who talk with their employees.

Employers and CEOs must understand that how employees feel in the workplace matters as it influences their thinking and behaviours. Senior leaders do not need to be experts. They only need to set the terms and expectations for their psychological safety [playbook](#). There is little hope the concept of IDEA will achieve its potential when there is fear in a workplace, especially among marginalized groups who fear losing their jobs if they speak up or question anything being done to them.

TIPS FOR EMPLOYERS

Tips for employers that want to mature the IDEA concept through leveraging two psychological safety lead practices:

Obtain an intersectional, psychologically safe baseline and remeasure regularly. Collect valuable qualitative and quantitative data on employees' experiences regularly. Through focus groups, interviews, pulse checks or online validated assessments like the [WPSA](#), employers can gather meaningful data that shines a light on employees' perceptions of their mental fitness/resiliency and psychosocial risk factors that drain or charge them. The data also notes psychosocial hazards (e.g., fatigue, anxiety), workforce involvement levels, the perceived value of current programs, employees' experiences with direct leaders and peers, and concerns about incivility, bullying, and harassment.

Collecting data on employees' inclusivity levels is critical to facilitate an intersectional analysis. This data allows for intersectional grouping analyses such as gender fluidity, age, diversity, and neurodivergence versus neurotypical groupings' inclusivity levels, allowing employers to compare low inclusivity groups' scores to higher inclusivity groups' scores against the above employee experience scales.

Without proper data and analysis, employers will not know how effectively their employee experience strategies facilitate psychological safety, workplace mental health, and IDEA. Employers will benefit from leveraging social scientists with expertise in statistics to help them obtain statistically accurate, evidence-based baseline results that can be easily explained to employees and leaders.

My coaching to employers is that collecting the right kind of workplace data is an art (e.g., how to get employees engaged and trust the process) and a science (e.g., data collected is accurate). Anyone can create a survey these days; however, making a scientifically sound one requires expertise. A wise investment is getting robust workplace analytics to avoid guessing and assumptions, which is often the case when laypersons try to interpret descriptive data.

Educate to create habits. Perhaps one of the biggest mistakes I see too many employers making repeatedly is investing in training and development without a road map for creating habits. General education to increase awareness is a fantastic way to spark curiosity and close ignorance gaps. However, driving IDEA literacy requires a plan that creates a program with a goal. The standard for a Plan-Do-Check-Act approach is a core, as are constant reinforcement, monitoring, incentives, and consequences. Random acts of inclusion can spark awareness, as Bell's Let's Talk does for mental illness.

However, until CEOs and senior leadership re-

alize that information is useless until it becomes a habit, success will continue to be evaluated by participation levels instead of employees' feelings. Leading change to create a place where all employees feel a sense of belonging and welcome is not about giving anything up; it is about discovering we all have different experiences.

Intersect governance and psychological health and safety. The Governance & Accountability Institute in New York City estimates that [90 percent](#) of S&P 500 companies publish ESG reports in some form, and a recent McKinsey & Company report suggested that approximately [70 percent](#) of Russell 1000 companies post them.

This report indicated that environmental issues have been the main driver (the E) and why ESGs have been gaining more attention as a critical consideration for corporate sustainability. It appears that boards are leveraging ESG as a framework to collect data supporting their roles in facilitating effective oversight and due diligence.

ESG refers to criteria that investors, boards, and senior leadership can leverage to understand better and evaluate an organization's impact on the environment (E). The "S" stands for *social*, which relates to a company's impact on people, employees, and customers. For some organizations, it encompasses communities and society. The "G" represents the metrics used to determine organizations' *governance*, including internal management, leadership structure, and financial and ethical standards.

The concept of employee inclusion, diversity, and equity focuses more on the "S." OHS legislation in North America provides minimal expectations for employers to protect workers' physical health and, in most jurisdictions, requirements for violence and harassment protection.

While psychological health and safety (PHS) receives some lip service, no standard legislation

defines employers' obligations to control workers' PHS risk, as does OHS. As a result, North American organizations are not provided precise requirements or expectations, such as OHS mandates for employers to screen for PHS hazards to protect workers from mental harm or injury.

Yet, there is a direct relationship between employees' perceptions of psychological safety and turnover, disability, and performance.

Workforce well-being is a critical factor that directly impacts and predicts an organization's sustainability risk. Some evidence that this may be an emerging trend comes out of [Australia](#), which has updated its Workplace Health and Safety Act to mandate that all employers identify potential psychosocial hazards and eliminate or reduce the risks of mental harm.

This is important as boards and senior leadership can make decisions that directly influence employees' experience. Senior leaders are accountable for setting expectations for the culture whose quality can directly impact employees' risk of mental harm and health. The growing cost of workplace mental health is becoming a greater financial risk and concern for senior leaders and boards. Employees' stress at work and risk of mental injury can predict short- and long-term mental health disability and further hurt organizations' bottom lines as compensation legislation is updated. For example, workers with fair or poor mental health take nearly [12 days](#) of unplanned leave annually, compared with 2.5 days for those enjoying good mental health.

Tone culture from the top. How board members treat each other and interact with executives sets the tone for an organization. People are appointed to governance boards for many reasons and bring specific skill sets. To take advantage of that diversity, boards must be safe places where members can ask follow-up questions without fear of negative consequences.

To create authentically inclusive boards, chairs must have the skills to facilitate psychologically safe environments that welcome and encourage diverse opinions from all members. Board members can allow their skill sets to shine more when they operate in an atmosphere where they can voice their opinions without fear of negative judgment or retaliation. Psychological health and safety to facilitate inclusion and workplace mental health is gaining attention at board and organizational levels.

Establish relationships, communication and strategy sessions between boards and executives. It would be reasonable to believe that any individual in a senior leadership role is confident, strong-willed, and resilient to adversity. However, people skills and emotional literacy are not often considered when promoting employees to leadership positions. Boards that take a psychologically safe approach to their executive teams can set a foundation for trust, allowing for difficult conversations, debates and challenges with executives. Boards and leaders with trusted relationships keep emotions and egos out of the way and focus on protecting for-profit organizations' shareholder value and achieving nonprofit organizations' purposes.

THREE CONSIDERATIONS FOR INFLUENCING EXPECTATIONS, GOVERNANCE AND PSYCHOLOGICAL HEALTH AND SAFETY

Regardless of a board's or senior leadership's readiness to expand its ESG reporting to include workers' well-being, the following steps can help facilitate the intersection of governance and psychological health and safety.

- **Train boards in psychological safety and organizational sustainability goals.** Technology drives how organizations behave, as do environmental changes and employers' expectations regarding duties and roles. Also changing are workers' expecta-

tions of what employers must do to create meaningful employment. Human emotion and mental health are becoming more significant drivers for attracting and retaining employees. Boards typically look for technical competencies in governance, human resources, financials and IT security. All board members should be trained in psychological safety to interact with executive leadership teams. This positions the chair to set expectations for board members' behaviour and create conditions to challenge, debate and ask questions effectively in a spirit of good governance.

- **Set expectations for executive teams to work with boards.** Boards provide oversight, and executive teams facilitate management and decision-making to achieve organizational goals. Boards ensure that due diligence within their oversight protects organizations' sustainability and guides leaders to operate to their full potential. Environments that fail to do this risk having individuals who feel unsafe representing their authentic selves and stating their views and opinions. This stifles and limits the benefits of diverse thinking and ideas, often leading to negative group think and less-than-optimal interactions.
- **Leverage external reviews to obtain unbiased workforce health and employee experience.** Understanding the impact of psychological health and safety within the entire organization at the directors' board level can reduce risk, increase effectiveness, and help a board know how it is meeting workers' needs. Board governance depends on independent third-party financial audits to ensure finances are accurate, as financial health is a lagged

indicator of organizational sustainability. Similarly, workers' psychological health and safety are lead indicators of turnover, disability, counter-productive behaviour, accidents, and overall productivity. External reviews can shine a light on psychosocial risk factors and hazards, employee well-being and safety, confidence in leadership, and the employee experience. Like independent financial auditors, independent psychological health and safety experts can provide unbiased opinions, risk reports, opportunities, and strengths to assist boards in facilitating oversight and ensuring the information senior leadership provides about workforce sustainability is accurate.

The reputational risk of an organization that doesn't care for its employees impacts its ability to attract talent and its brand. Major psychological safety issues that resulted in employee silence include NASA's Challenger shuttle disaster, GM's ignition switch crisis, VW's dieselgate scandal, Wells Fargo's fake account issue, and France Telecom's restructuring that went beyond damage to brand and shareholder value to workers dying by suicide. All these tragic events could have been avoided if employees had safe channels to communicate to boards what was happening instead of what was being reported (e.g., favourable financial results without insight into mental harm and risks taken to achieve results).

Like financial auditors, boards can leverage external subject matter experts with credentials and competencies to facilitate psychological health and safety reviews through an intersectional lens. Boards can use this procedure as a due diligence step to ensure they have the necessary facts to guide executive leadership teams.

Plan for resistance:

A critical success factor for creating a psychologically safe culture

How often have you had a great idea that ended with disappointment in another's response? Think about the ideas you were so excited about that became frustrations at home and work.

A critical step often forgotten by psychologically safe facilitators is planning for resistance. The unpinning of this approach is that employees may not be open to ideas that appear promising. Consider the challenge of getting 75 percent of a workforce to complete a psychological health and safety assessment like the Mental Fitness Index (MFI).

Employers who want to mitigate workers' mental harm and promote mental health require data like the MFI provides to appreciate and understand what they can do better and what works well. The motivation is to educate employees on their overall mental fitness and employers on employee experience regarding a psychologically safe culture, the workforce's mental fitness profile, and how effectively programs are working.

Psychological health and safety initiatives like resiliency training, EFAP, leadership training, and mental health apps are intended to protect workers and maximize potential.

Frustration is a pain point for many psychologically safe facilitators after they review the utilization and participation levels of programs like EFAP, which they invested energy in getting into the work culture. Lower-than-desired engagement levels leave them wondering why and what to do.

COACHING TIPS TO INCREASE WORKPLACE MENTAL HEALTH PROGRAMS' ENGAGEMENT

Psychologically safe facilitators who anticipate and prepare for resistance increase the opportunity to remove engagement barriers and understand how to best engage workers in new programs. The following are two factors that can increase engagement and program impact if dealt with before launching any new program:

- **More is not the answer**—Too often, instead of understanding why programs or policies are not getting much buy-in, engagement or participation, the solution is to “do more stuff,” hoping that something new may catch the workforce's interest. Unfortunately, this becomes more noise, costs, and frustration. It often is not what the organization is doing but how.

Consider how the employer's commitment to a Plan-Do-Check-Act approach for each workplace mental health initiative would be evaluated. Recent CSA research found that employers may benefit from focusing more on the “Check” step to fully understand workers' thoughts on the benefits of all programs and policies to support workplace mental health.

- **Anticipate resistance**—There are a few things to consider regarding resistance when an employer wants to add something new. Much of human behaviour is programmed and run by

the unconscious mind (e.g., daily routines and habits). Anticipating something requires psychologically safe facilitators to step back and seek to understand the kinds of resistance that impede workers from engaging and participating.

- ◇ The unconscious mind's daily routines are prioritized as the most critical actions. Some workers may be interested in improving their health, but because of their workload, do not think or feel they have the space or time to focus on something new, even if it is good for them. Why? Doing something new requires taking energy and attention away from something else.
- ◇ Another reason can be confusion or lack of clarity over when the worker has permission to access a support resource or program during working hours. Without clear lines, a worker may never attempt to access a program at work. When they go home, they cannot use the support or resources because of home responsibilities like childcare or parental care.
- ◇ The lack of trust regarding what the average worker believes is the employer's true intentions for offering a program (e.g., MFI) can be a deterrent. Cultures with fear and concern that an employer is out to get a worker can create massive resistance to participate in an MFI or other program.
- ◇ Unwanted change. Most workforces experience change and uncertainty every day. Any new program is another change-management element. Why? Any new

workplace mental health program or policy aims to engage workers to stop or continue a behaviour, start a new behaviour or some combination. A successful workplace mental health program results in new habits. Understanding potential barriers, threats, and opportunities are common change-management considerations. Others are leveraging common change management tactics like senior leadership in messaging, creating a thoughtful communications strategy that allows space for questions and support opportunities, and following up and obtaining feedback on how a new program or policy is proceeding.

Build a game plan for managing resistance—

Putting the above information into a game plan requires curiosity about the resistance and opportunities for navigating it. Build managing resistance into the planning step of the Plan-Do-Check-Act framework. Managing resistance requires engaging the target audience to discover the potential opposition and opportunities. This step helps to promote the program's benefits and find the possible, unintended consequences and resistance.

Resistance is human nature and a normal part of any change management process. Not considering resistance and planning for it is a common miss for psychologically safe facilitators. Planning ensures workers are fully engaged and their opinions are heard and considered. Planning is a critical recommendation in the CSA Z1003 Standard on Psychological Health and Safety to engage workers in creating a psychologically safe culture.

Optimizing your workplace mental health investments

A Deloitte Canada report [suggests](#) the median annual return on investment for workplace mental health programs is \$1.62 for every dollar invested. After three years, this number increases to \$2.18.

These numbers are compelling; however, simply spending money on programs doesn't guarantee this return. For example, providing employees with access to a mental health app that teaches them resiliency skills will have little impact if they don't use it, and those who do don't absorb the information or adopt the recommended habits.

INVEST IN MEANINGFUL MENTAL HEALTH PROGRAMS

To maximize impact and return, you must begin with the end in mind. Define what success or desired impact looks like by gathering input and feedback from your employees – the people who will use the resources you are considering.

Conduct focus groups, analyze HR and disability data, and investigate issues, work decisions and policies that drain employees.

[\[Read more about work demand, positive charges and negative drains\]](#)

For example, you may find that employees are taking more sick days because they are stressed about incivility and rudeness from peers. This might lead to investing in [respect in the workplace training](#) or providing resources that promote civility and educate employees about conflict resolution.

Gather all the insights you need to confidently

answer why, what and how before investing in mental health programs, courses and resources. This decision-making phase will help you design or screen programs to ensure they align with the organization's needs. Answering the questions below will also help you design the implementation process and decide how effectiveness will be evaluated.

- *Why is it beneficial to focus on X to achieve Y outcome?*
- *What is the best internal or external option available to facilitate this desired outcome?*
- *How will the program achieve the desired outcome?*
- *How will success be measured?*
- *How will the program be implemented?*
- *When will workers have access to it?*

Adages such as slow down to go fast or measure twice and cut once apply when designing workplace mental health initiatives to achieve measurable value. You don't want to make any hasty decisions or take an unplanned approach only to find you are no further ahead or, worse, set back from your desired goals.

When you have answered what, why, and how and decided to invest in an initiative or program, there are some steps you can take to maximize its value and impact.

- Create a realistic budget and be sure to include money for evaluation.
- Consider the time commitment required. In an organization of 1,000 employees, 15

minutes equates to 250 hours of available FTE capacity. Be sure you've assessed the benefit of taking time from core work, and let employees know you have accounted for the time it will take for them to use the resource or engage in the program. Too often, workplace mental health initiatives, especially those aimed at preventing mental illness, are not built into the workday, and employees must figure out when and if they can afford the time to engage.

- Consider the cost of doing [nothing](#). What would be the cultural, psychosocial and financial impact if you didn't invest in this program or initiative and the issue persisted?
- ROI must be considered before launching a workplace mental health initiative. Define the intangible (non-monetary) and tangible (monetary) data points that can be measured and used for an ROI analysis before and after implementation.
- When you decide to move ahead, communicate expectations and the perceived benefit to employees early and often to increase their understanding and use.
- Connect the dots so they understand the WI-IFM (whats in it for me) and how the resources you're offering link to your organization's values and business objectives.
- Be clear about the behaviours and habits you

With the right forethought and planning, significant gains can be made by investing in workplace mental health.

expect from employees, and identify the key performance behaviours ([KPB](#)) and key performance indicators (KPI) you will assess. For example, if data indicates that leaders in a group are not trusted, one KPB would be providing direct reports with regular, meaningful, psychologically safe channels to provide feedback and identify behaviours the leaders should adopt to improve trust.

- When measuring employee feedback on a workplace mental health initiative, go beyond satisfaction and adopt a continuous improvement mindset. A month or two after participating in an initiative or using a resource, assess what employees have learned and the habits they are applying. Investigate whether they feel these habits are helping them.
 - Adopt a Plan-Do-Check-Act approach to ensure continuous improvement. Make it easy for employees to engage and check in regularly to identify and reduce or eliminate barriers to success.

Working with many organizations across North America, I have often found a lack of clarity around why, what and how to introduce mental health programs in the workplace. However, with the right forethought and planning, significant gains can be made by investing in workplace mental health. Employee well-being and engagement will improve, absenteeism and presenteeism will be reduced, productivity will increase, and you will realize optimal return on your investment.

Preventing psychological harm caused by negative work demand

Employees can perceive work demand as a positive charge (i.e., manageable and rewarding) or a negative drain (i.e., overwhelming). It becomes a negative drain when they are consistently asked or expected to do excessive, taxing, unrealistic and stressful work.

Coping with these demands can result in longer days, lack of home- and work-life balance, fatigue and conflict. Employees who experience this for prolonged periods will begin to feel overloaded and overworked.

If negative work demand persists, it can result in emotional and cognitive exhaustion and can create an accumulative stress load, resulting in psychological harm and possibly mental illness.

WHAT LEADERS CAN DO TO MITIGATE NEGATIVE WORK DEMAND AND PSYCHOLOGICAL HARM

Leaders must accept that [humans have capacity limits](#) like machines. Setting an aggressive project timeline and pushing for completion within a few days, with a team's support and buy-in, to achieve a defined goal can be a positive experience. It can be exhausting and still provide a sense of reward — if it is the exception. However, it shouldn't occur on a regular and recurring basis where employees don't see an end to [pressure](#) and feel they cannot keep up with the constant push and demands.

If we arm ourselves with insights and start with the steps below, we can prevent this and mitigate the impact of chronically draining work demand.

- **Be present and listen:** If your employees see and trust that you care about their well-being, they will be more likely to share their experiences and concerns without fear or hesitation. You can show you care by paying attention to workload and regularly checking in to anticipate and address work demand issues before they become a problem.
- **Believe and inquire:** When employees share concerns about work demands, take time to listen and understand the challenges they are facing. Typically, employees who report work demand concerns do not refer to an exceptional event. They are experiencing a pattern of behaviour and demand that occurs repeatedly and pushes capacity limits daily. Ask questions and gather information and insights to understand the risk and root causes (i.e., what has changed, what is driving them, how long this has been happening). Note whether it is in an individual or a group of employees experiencing issues. Sometimes, an individual will raise concerns if they are not a fit for their job or are dealing with a challenging health issue. The same complaint from a group may indicate a systemic problem and require a work design adjustment.
- **Evaluate the situation using a job design lens:** Examine work demand through a job design lens. Time demands to complete work should consider targets, peak times, and staffing levels. The constant pressure to complete work with unrealistic timelines can result in

poor decision-making, like taking shortcuts that can risk a person's safety. Work demand pressures can increase an individual's emotional, cognitive, and physical strain, negatively impacting their experience and health.

- **Include employees in problem-solving and planning:** Invite employees to provide opinions and options to address issues and mitigate risk. Listen to concerns and perceptions. Be open to suggestions and let employees know their input will be considered, but listening doesn't mean you always agree with what is being shared. Let them know what the next steps will be. Managers may not have the authority to deal with some of the root causes of work demand concerns alone and may need to bring other managers, teams and/or senior leaders into the discussion.
- **Be mindful of the cost of doing nothing:** When evaluating work demand options, be mindful of the costs and risk of doing nothing (i.e., high turnover and replacement costs). Ignoring work demand concerns and dismissing alternative approaches and options can negatively impact the organization's performance and employees' psychological well-being. The goal is to create a simple action plan of realistic controls that can be put in place. These may include changing how ad hoc work or projects are assigned and adjusting staffing levels to suit workload demand.
- **Implement an action plan and monitor progress:** Keep employees informed throughout the process. Share actions and remedies you will take to address their concerns regarding work design and emotional, cognitive and physical demands.

PREVENTING NEGATIVE WORK DEMAND AND PROTECTING PSYCHOLOGICAL SAFETY IS POSSIBLE

In one workplace, many employees were spending four hours a week in unnecessary meetings, and there was a pattern of last-minute, ad hoc assignments given late in the day, often without clarity on deliverables, resulting in long days and early starts to get work done. Leaders used insights and input gathered from employees to address the problem.

Employees were coached and encouraged to take their lunch breaks, and managers were encouraged to role model this habit. Using a Plan-Do-Check-Act approach, leaders started using a three-item weekly pulse check on work demand to measure progress and a monthly check-in on how the action plan was working. By evaluating work demands using a job design lens and listening to employees' experiences and ideas, leaders demonstrated that they cared about employee well-being, and trust was built because employee concerns were taken seriously.

DON'T WAIT FOR NEGATIVE WORK DEMAND TO TAKE ITS TOLL IN YOUR WORKPLACE

If you suspect negative work demand is an issue in your workplace, address this hazard immediately. Assess individual team and employee workloads (e.g., percentage of time spent doing core, project, and ad hoc work) and pay close attention to your team's psychological safety and health.

Mitigating negative work demand can profoundly impact workplace culture, employee engagement and retention. It can reduce employee burnout, sleep disturbances, anxiety, fatigue, absenteeism, disability claims and customer complaints. Being proactive in managing work demand and showing your employees that you are committed to their well-being by displaying humility, empathy, and caring so they feel safe sharing their experiences without fear of retribution.

Mitigating the psychological impact of AI in your workplace

In his latest shareholders meeting, Warren Buffett made a profound statement that AI is out of the box and there is no stopping it. Good or bad, it is here. He related it to the atomic bomb's massive impact on the planet.

Ernst & Young's AI Anxiety in Business [Survey](#) found that 48 percent of employees are concerned about AI, and 41 percent think it is moving too fast. More than 70 percent are concerned AI will impact their compensation, 67 percent feel they could lose out on a promotion because of a lack of AI knowledge, and 66 percent worry that they will fall behind if they do not use AI at work.

The American Psychological Association's 2023 [Work America Study](#) found that nearly 40% of workers worry that AI will take some or all of their jobs, making them obsolete.

These fears are not unfounded. The World Economic Forum [estimated](#) that AI will replace 85 million jobs by 2025, so it's natural that the rapid rise of AI is causing considerable stress in the workplace.

MITIGATE THE IMPACT OF AI AS A PSYCHOSOCIAL RISK FACTOR

In previous posts, I've discussed [managing psychosocial factors](#) that can drain employees. As leaders, we must recognize that the drain of AI will only grow.

When a psychosocial risk factor is perceived as draining, based on its frequency, duration, and intensity, it can lead to fatigue, accidents, isolation, stress, and burnout. Employees experiencing

psychosocial hazards are at increased risk of mental harm, injuries, and illness.

One way to mitigate the risk of AI-induced stress in your workplace is to use focus groups and surveys to assess employees' experiences and concerns.

In addition, you may consider the following steps to help workers navigate the approaching AI wave and proactively manage its impact to protect employees' health, performance, and retention.

1. **Understand and anticipate resistance to change**—AI is evolving and maturing rapidly, and most of us cannot process its exponential growth. AI will drive a significant shift in how work is organized and performed. When facilitating a psychological health and safety audit or developing a workplace mental health plan, take stock of the degree to which AI is perceived as a charge or a drain on employees' well-being.
2. **Support employees' mental fitness**—Unlike machines, humans feel emotions. Stress can increase tension and conflict if not dealt with appropriately. Mental fitness can help employees accept what they can and cannot control and mitigate worry, anxiety and mental harm related to the changes AI will bring.
3. **Facilitate and implement a transparent AI-in-the-workplace policy**—AI has many positive benefits and potential risks, such as fraud and privacy issues. For example, we hear about voice and video dupes and many other

ways AI is manipulated for criminal gain. In recognition of this, many organizations are developing AI policies; some are even creating [Chief AI Officers](#). An AI policy must clearly outline expectations regarding approved AI platforms, data privacy, usage, access, limits, security and applicability to work.

4. **Provide training to set employees up for success**—With the rapid advancement of AI, it's likely that job entry will be defined less by a candidate's education and more by their ability to adapt and learn. Employees must be open and embrace learning to ensure they are set up for career success. Leaders can offer opportunities to upgrade skills so employees can enhance their value proposition and stay current on AI policies.
5. **Communicate often and be transparent**—Ensure employees understand how AI may change some job functions and eliminate others. To offset the challenges it will bring, be sure to share information about new job opportunities and available training in equal

measure. Being transparent can help mitigate the inevitable fear that will come with a change that affects every aspect of employees' lives.

A [Forbes article](#), *How Does Artificial Intelligence Create New Jobs?*, [highlights](#) that AI may replace some workers and create new jobs like machine learning engineers, health data analysts, agro technologists, data scientists, and specialized researchers. However, it also reinforces that core human skills like empathy, problem-solving, leadership, and creativity are soft skills that will always be critical to business success.

As Buffett says, there is no turning back. People may resist, but the future of work will require constant upskilling and adapting. You can help your employees embrace this evolution by regularly taking stock of the impact AI is having in your workplace, putting plans and policies in place to maximize the synergy between humans and technology, and training and communicating to help ease the stress and drain on them in this new normal.



Creating a psychologically safe workplace for neurodivergent employees

Do you know the difference between neurotypical and neurodivergent employees?

“[Neurotypical](#)” describes a person who thinks and processes information in ways typical within their culture and tends to learn skills and reach developmental milestones around the same time as their peers.

Neurotypical individuals often find learning and maintaining workplace relationships much easier than neurodivergent workers. Leaders expect them to adapt to changes in routine, tolerate sensory stimuli challenges, focus despite constant and sometimes loud noise, maintain social and organizational skills standards, and focus on learning new tasks for extended periods.

A [neurodivergent](#) individual processes information differently due to conditions or disorders, such as attention deficit hyperactivity disorder, autism, a learning disability, Tourette’s syndrome, or synesthesia.

Too often, neurodivergent workers are viewed as having a mental illness when, in fact, they just have different ways of processing and understanding their environments.

As leaders, we must ensure that all workers feel psychologically safe, welcomed, valued, included, and confident speaking up and sharing their concerns and needs without being judged. We must also understand and accept that just because a neurodivergent worker does not process information or interact with the world as they do does not mean they are not capable.

BECOMING AN INCLUSIVE LEADER REQUIRES UNDERSTANDING, FLEXIBILITY AND COMMITMENT

As an international expert in workplace mental health and leadership who happens to be neurodivergent, I can tell you that living in a neurotypical world is not easy. I have lived with ADHD and a learning disability my entire life and have experienced oppression and judgment because I do not speak, respond, spell, and read the same as my neurotypical counterparts. Most people expect us to think and behave like they do. But that’s not how we are wired.

I often tell people that ADHD is my biggest challenge and strength. For all the burdens and strained relationships this condition has created for me, I would never have accomplished all my education, writing, research, and experiences without it. I couldn’t have achieved these things if the environmental support systems, resources, and mentors who saw something in me weren’t understanding, flexible and committed to my success.

Fortunately, I am confident in advocating for my needs and have accomplished enough that most neurotypical individuals interested in working with me adapt rather than expecting me to adjust to them in ways that aren’t possible for me.

Not all neurodivergent workers are as confident. They require environmental support, tolerance, and patience to unleash their full potential so they, too, can thrive in a neurotypical world.

TIPS FOR HELPING NEURODIVERGENT WORKERS THRIVE

Neurodivergent workers shouldn't be made to adjust or adhere to neurotypical standards. Leaders should positively influence and adapt the environment, if necessary, to ensure needs are addressed and all employees can thrive and reach their full potential. To do this, you must be open to learning, adapting and embracing continuous improvement.

The following tips help you understand how neurodivergent employees experience the world and what we need to thrive and feel psychologically safe in the workplace.

- **Learn about neurodivergence from an expert**—It is [estimated](#) that 15 percent to 20 percent of the population—primarily male—is neurodiverse, and evidence suggests that neurodiverse teams are 30 percent more productive and make fewer mistakes than those with neurotypical members. Training can support workplace inclusion goals by challenging implicit bias and curbing oppression and marginalization of workers disadvantaged because they do not communicate or process the world like neurotypical workers or leaders.
- **Be open and willing to make informal accommodations**—Leaders can remove barriers and facilitate informal accommodations, such as providing feedback in writing before a meeting so an individual has time to prepare or allowing people to wear headphones to block out noise.
- **Work with neurodivergent workers to understand their best roles**—If a team member shares that they are neurodivergent, talk to them to understand what they feel they need and what they and you feel their strengths are to define a role that is the best fit to help them be successful and the team to achieve its goals. For example, asking a visually dyslexic worker to do the final edit of a memo before it goes to the board may not be a good decision. When they feel safe and supported, most neurodivergent workers can articulate the tasks they believe they excel at and those they find most challenging. The only way to understand a person's best role is to listen and learn from them. It is okay to respectfully challenge, question, and learn.
- **Inquire about existing support resources to maximize employees' experience and productivity**—Look for supports to help neurodivergent workers thrive. Listen carefully to what the individual finds challenging and look for what can be done to maximize their experience, safety, and opportunity to succeed in their assigned roles and tasks. In my case, it was being provided with professional editing. I am visually dyslexic. There aren't any courses or training programs that can change how my mind processes written words. Without professional editing, I would never have published one article, let alone hundreds.
- **Discover the best work arrangements for their roles**—Some neurodivergent workers are hypersensitive to noise, light and stimuli (e.g., movement of people) that can be distracting, discomforting, and in some cases, verge on painful. For example, I have always needed a quiet space when working. Cubicles were a no-go for me—too much distraction. I either worked in my home office or had an office where I could find quiet to focus. Because there are many kinds of neurodivergent workers—not all are desk workers—try to understand the available options. Consistency of shifts and teams is essential in a manufacturing environment for some neurodivergent and neurotypical employees.

- **Be interested in employees as people**—You can build enormous trust by putting humanity into the equation. Showing interest in all employees, understanding what they like and dislike, find easy and challenging, and learning about their career aspirations will strengthen your connection. When employees trust their leaders, they are more likely to feel safe sharing ideas, worries, concerns and positive experiences. Many workers may not know they are neurodivergent and have never been tested. Building trusted relationships allows workers to share their struggles with their environment and peers, which could help them identify issues.
- **You don't have to be a therapist to be a strong leader**—You don't need to be a psychologist and screen workers for neurodiversity. The core objective of leading through a psychologically safe lens is to remove fear and barriers, facilitate conversation, reduce anxiety, and encourage accountability and learning.
- **Encourage employees to tap into their superpowers**—Confident leaders who understand that neurodivergent workers possess unique strengths, talents, and perspectives that can result in new ideas, thinking, and perceptions of what is possible. Take the opportunity to tap into their gifts. I often tell senior leaders that neurodivergent brains don't necessarily see the same boundaries as neurotypical brains. You may miss out on some incredible opportunities if you're not listening and open to differing viewpoints. Instead of jumping to, "No, that could not work," consider asking, "Why do you think

that? What would need to be done to ...? How would we do it within ...?" By creating a space for innovation and creative thinking, neurotypical leaders increase the opportunity to find a solution or option they may never have considered or thought was possible.

- **Provide coaching when needed**—Every employee has needs, challenges and struggles in the workplace. Neurodivergent workers (e.g., fall on the autism spectrum) are no different. When you are in tune with your employees, you are more apt to notice when they find a task challenging to understand or complete. You can seize these opportunities to provide coaching and support in a manner that suits the individual, keeping in mind that everyone learns differently, and sometimes, people need extra support, clarity and encouragement to get on track.
- **Don't apply a blanket approach**—No two neurodivergent workers' needs are the same, no different than neurotypical peers. The key for leaders is to listen and discover how to support workers with different needs and help them thrive by adapting the work environment to make it more neurodivergent-supportive and inclusive.

Too often, people are judged for acting differently. However, as leaders, we must be careful not to confuse differences in how people interact with others and process information as signs of lesser intelligence and capability. Psychologically safe leaders help all workers—neurodivergent and neurotypical—tap into their strengths, access support and resources, and remove barriers and obstacles so they can succeed and realize their full potential.

Start the new year by showing you care: Conduct a respectful workplace audit

The workplace significantly influences employees' experiences; every interaction creates positive or negative emotions. If they have more negative than positive experiences, it can increase the risk of mental harm and illness in the workplace.

Sadly, I'm noticing increased incivility, misunderstanding, and unresolved conflict in many workplaces. When they aren't dealt with in a meaningful way, they can fester and lead to a culture of bullying, harassment, discrimination and workplace violence.

Most CEOs I chat with truly care and realize they have a role in creating psychologically safe workplaces; however, knowing and doing are separate things. And, even when action is being taken, they aren't sure their efforts are having the desired impact.

WHERE TO BEGIN?

When a CEO asks me about psychological safety, I point out that psychologically safe workplaces are characterized by accountability, learning, and healthy conflict resolution. All employees feel included, valued and encouraged to speak up without fear of retaliation.

One of the first questions I ask is, "Do you have a safe and respectful workplace policy and training in place?"

At the very least, you should ensure that you are fulfilling your obligation to maintain a psychologically safe workplace as defined by provincial legislation.

Establishing a baseline of psychosocial risk factors that may create unnecessary strain and stress in your workplace is also helpful.

CONDUCT AN ANNUAL SAFE AND RESPECTFUL AUDIT TO FACILITATE A PLAN-DO-CHECK-ACT APPROACH

If these foundational pieces are in place, I ask, "Do you know if your policies and programs are working?" Often I hear, "I'm not sure."

I developed the [Mental Harm Prevention Roadmap with WSPS](#) to guide employers through building programs and policies to impact the employee experience positively. It outlines eight evidence-based building blocks that facilitate a Plan-Do-Check-Act approach.

Taking this step demonstrates to your employees that you are committed to ensuring they are psychologically safe by taking stock of the safe and respectful policies, procedures, training and resources that work well and those that need improvement.

IMPORTANT ELEMENTS OF A SAFE AND RESPECTFUL AUDIT

The following are steps to conduct a safe and respectful workplace audit. Of course, every organization's list will be influenced by size, business type and applicable federal or provincial OHS standards.

You can obtain the data you need from HR records, conducting one-on-one interviews and hosting employee focus groups. It is also prudent to consider doing a workplace violence risk assess-

ment as a part of the process.

1. **Safe and respectful policy and procedure review**—Are these critical documents easily understood? Or are they difficult to understand? With low literacy levels and a growing number of employees for whom English is a second language, you should be careful not to assume that all employees will understand what they mean and what is expected of them. Check to confirm understanding.
2. **Examine how relatable the current safe and respectful training is**—Training on this topic often meets corporate and administrative requirements but may not be engaging. What is your training program like? Does it clarify what employees should do when they experience a concern, how complaints are handled and employees' responsibilities for creating a psychologically safe workplace? Assess the perceived value of training and its usefulness for developing the habits required for a psychologically safe culture through an adult learning lens.
3. **Build trust in your ability to execute policies and procedures fairly**—Employees often observe how employers and leaders deal with other employees. Policies and procedures for a safe and respectful workplace are of little value if employees do not believe the employer will enforce them fairly and equitably. It can be helpful to conduct a workplace violence audit to check on overt and covert risks that could put employees at risk and understand employees' concerns about workplace violence and whether they believe employers' actions are adequate.
4. **Measure and track the employee experience**—The number of complaints and investigations is a helpful data point. It may be beneficial to survey to measure employees' experience. [The Employee Experience Review for](#)

[a Respectful Workplace](#) also collects data that can be used for a workplace violence risk assessment. For example, if 25 percent of your workforce experienced one event in the last 12 months and only 1 percent reported, this should raise questions and allow you to ask why. Employees are less likely to report concerns they experience or unsafe behaviours they witness if they do not trust leadership.

5. **Provide access to competent workplace investigators**—Faulty workplace investigation is risky. Every HR and OH leader must be mindful and mitigate this risk. Whether you use employee or external investigators, ensure they have been trained and completed a credible program such as [UNB Workplace Investigation Training](#).
6. **Outline a framework for facilitating workplace restoration**—There is a risk of hurt feelings or [emotional ruptures](#) when a formal or informal complaint is made. Repairing and moving forward is critical to creating a psychologically safe culture after an incident. Employers cannot fire everyone who breaches a respectful workplace policy or cultural values. Leaders need to know how to move through conflict to facilitate restoration, repair and acceptance of what happened. Discipline and restitution must be completed when appropriate, along with forgiveness, so all parties involved can move forward. One significant gap I find is that this step is not contemplated enough in many organizations, and there is an over-focus on the process, not people and their emotions. The north star of psychological safety is removing fear and silence and dealing with conflict head-on to learn and move forward.

CEOs can demonstrate that they place high value on the employee experience by having the right policies and processes and regularly evaluating safety and respect in their workplace.

Fear factor: Your business will suffer if employees are afraid of making mistakes

Are your employees afraid of making mistakes?

If you said that you don't think so, how confident are you that employees would say the same? Winston Churchill's words, "Perfection is the enemy of progress," are as true as ever. Workplace behaviours and policies that create fear of making mistakes reinforce the impossible standard of perfection, which can undermine employee engagement, well-being, innovation and progress in your organization.

Employees fear taking risks when they hear, experience, or observe punishment for errors. The benefit of sticking their necks out for a possible win doesn't stand a chance against the fear of potential negative consequences and the impact on their reputation, career progress, or job security.

A culture of fear also has a direct impact on the well-being of employees. They are more likely to experience worry, anxiety, sleep disruption, interpersonal conflict, and isolation.

TO ERR IS HUMAN

In psychologically healthy and safe workplaces, leaders understand that humans are not perfect and allow for errors in how work gets done and goals are achieved. In high-performing workplaces, mistakes are seen as opportunities, even when inconvenient; they fuel learning and innovation.

A [*Psychology Today*](#) article says, "Mistakes are

inevitable in life and learning to appreciate them enables enlightenment and growth." Conversely, Fear of Making Mistakes (FOMM) can:

- Stop a person from learning and growing
- Cause people to give up or not engage in a behaviour
- Make people intolerant of fallibility in themselves and in loved ones
- Stop people from living their fullest lives

You can increase the chances of failure when you handle it poorly.

Too many employees go to work each day, fearful of making a mistake. Regardless of the sector, fear of not being good enough or making mistakes can harm the workplace experience. One study found that 52 percent of U.K. employees fear being wrong, severely impacting their decision-making and choices.

From a behavioural science perspective, how you treat mistakes can increase your workplace's failure rate. Human survival has evolved by avoiding danger. Stories about poor treatment for making a mistake (e.g., reprimanded, corrective action, termination, demotion) create fear. Employees who operate in this climate are more likely to make unnecessary errors.

The fear of making a mistake drives most fear. Edward Deming, the father of the total quality

"I have not failed. I've just found 10,000 ways that won't work."—Thomas A. Edison

management movement, is famous for [saying](#), “Drive out fear so that everyone may work effectively for the company.”

NOT ALL MISTAKES ARE THE SAME

There are different kinds of mistakes. One way to think about an error is whether it is blameworthy. A blameworthy mistake is when an employee is trained on a procedure, such as lockouts, but intentionally ignores protocol and gets hurt, hurts someone else, or has a near-miss.

A non-blameworthy mistake, better thought of as a learning opportunity, is when an employee takes the initiative to resolve a problem, uses a logical approach, and ends up with a less desirable outcome.

And sometimes, employees you know and trust to do good work inadvertently make mistakes due to unforeseen circumstances or pure oversight. Whatever the case, the way you manage the situation is critical.

In Dr. Amy Edmondson’s newest [book](#), *The Right Kind of Wrong: The Science of Intelligent Failure*, she purports that failure is an outcome that deviates from expected and desired results. She teaches that some failures to achieve defined standards, procedures, and policies are due to errors. Others are not. There are three types of failure:

1. **Simple failures** (i.e., human errors)—The root cause is the person knows how to do it right, but the process doesn’t go right for some reason.
2. **Complex failures** (i.e., human accidents)—Factors come together uniquely despite the reasonably familiar contexts to prevent them.
3. **Intelligent failures** (i.e., opportunities for learning and growth)—Undesired results are due to trying something new.

TIPS FOR LEADERS TO DRIVE OUT FEAR OF MAKING MISTAKES

Edmondson says that to “fail well,” leaders must be clear on what success looks like and create the path to get there. Below are a few steps to get you started.

- **Clarify what degree of risk is appropriate** to experiment to achieve better outcomes.
- **Create a safe space for sharing ideas**—Encourage employees to share their ideas to solve complex problems without fear of judgment. This can drive out fear and help employees feel valued and safe when taking risks.
- **Talk about mistakes and learning**—Make it clear that taking risks, trying to solve problems, and making the best decision possible with the information available are accepted and seen as essential for helping the organization move forward. Reinforce that mistakes happen, and learning from them is critical to avoid making them again.
- **Train leaders to deal with mistakes**—Do not assume all leaders know how to deal with mistakes. To build trust, employees must see that leaders are prepared to support them and express empathy when they have a setback due to making a mistake. You can reinforce and normalize that mistakes happen. Mistakes are inconvenient but a part of learning. There is no escaping this reality.

When you promote taking informed risks and show others how to regroup when errors happen, you build a learning environment focused on excellence rather than perfection.

Overcome learned helplessness with the power of psychological safety

Learned helplessness is a painful psychosocial hazard that may not be on your radar but should be.

Psychology Today says, “Learned helplessness occurs when an individual continuously faces a negative, uncontrollable situation and stops trying to change their circumstances, even when they can do so.”

It has also been [defined](#) as conditioning, where a person expects pain, suffering, and discomfort through experience, believing there is no way to escape.

Learned helplessness can thwart psychological safety. Recurring negative experiences due to a toxic culture, an overbearing command-and-control leader, and feelings of being constantly overwhelmed with no decision-making autonomy can wear down employees. In this state, people don’t feel safe speaking up or think that when they do, they get in trouble or no one listens. They start to believe they have no control over what happens to them and think, feel, and act as if they are helpless.

When employees [experience](#) helplessness, their quality of work and workplace experience are negatively impacted. It can also damage health and well-being, contributing to anxiety, depression, and post-traumatic stress disorder.

Override learned helplessness in your workplace. You can mitigate this risk by recognizing that every interaction, decision and process generates a positive charge or a negative drain on em-

ployees.

[ISO 45003](#), *Occupational health and safety management — Psychological health and safety at work — Guidelines for managing psychosocial risks* is an excellent guide that can help you assess the amount of drain and charge employees experience in your workplace. Using the ISO 45003 lens, you can look at how work is organized, interpersonal interactions and the physical environment and equipment.

If the workload seems fair and manageable and provides a sense of purpose, workers will likely perceive it as favourable. They are more likely to experience positive emotions that affect brain neurochemicals that influence mood.

Prioritize psychological safety. Creating an environment where psychological safety is non-negotiable and rewarded will help negate learned helplessness and make it safe for employees to be themselves, contribute and raise concerns without fear of judgment, and ultimately, enhance your business outcomes.

GET STARTED WITH THESE STEPS

1. Complete a psychosocial hazard risk assessment through an intersectional lens. This can be done through online assessments like the Workplace Psychological Safety [Assessment](#). Find out whether employees feel drained or positively charged in their workplace interactions and solicit feedback to help mitigate mental harm, injury, and illness through one-on-one discussions and focus groups.

2. Educate leaders to help them understand how their actions can positively or negatively impact the employee experience. Help them recognize the signs of learned helplessness so they can promote help-seeking behaviours and address issues that could lead to more significant problems.
 3. Promote mental fitness and educate employees on the importance of paying attention to optimism and pessimism in managing their mental health. Encourage them to use free, online, confidential [optimism](#) quick screens to get a snapshot of their outlook.
 4. Talk to employees about the importance of proactively managing their mental health and regularly remind them of the resources available to support them.
- Ignoring the risk of learned helplessness could lead to serious issues, including increased turnover, more disability claims due to mental illness, and lost productivity. Before workers can improve their situations, they must believe there is an alternative to what they are experiencing. You can start to show them that there is by listening, adapting and creating a work environment where they feel energized, valued and in control.

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Domestic violence may be looming over your workplace.

Are you ready to protect employees?

It can be challenging to know if your employees are being victimized, and easy to assume domestic violence isn't affecting your team, especially from afar. However, statistics show that approximately 33 percent of employees are at risk, and 54 percent say it has followed them into the workplace.

It isn't always a case of men being violent towards women. Women also abuse men, and [LGBTQ](#) couples experience domestic violence at equal or higher rates than heterosexual couples.

When it permeates a workplace, domestic violence can take a significant toll on employees' mental and physical health. It impacts performance, productivity, absenteeism and morale, costing a business thousands of dollars. Canadian businesses lose \$77.9 M to domestic violence every year.

Employers have a duty to protect employees from all forms of mental harm and physical injury, including workplace violence and harassment. They must have the necessary policies in place and train employees so they feel confident and equipped to follow them if an incident occurs. But more than that, caring, kindness and a commitment to creating a safe work environment can go a long way towards breaking through barriers with employees at risk.

For over 35 years, I have seen kind souls end up in emergency wards several times before having the courage to ask for help. Leaders who have not experienced violence or abuse cannot imagine

how much fear is involved and how it drives survival behaviours.

The following are additional steps to create a safe space and support those exposed to violence in your workplace.

1. **Become a trusted leader.** Build rapport and trust with all your employees. If they know you are committed to their safety, they will be more apt to ask for help when needed.
2. **Talk about this risk.** Taking moments to pause and reflect on real-life challenges like mental health, suicide and domestic violence won't worsen things. You are creating pathways to protect your employees and showing you are there if needed and can assist in getting help.
3. **Train employees to facilitate a safe and respectful workplace.** The [Bystander Effect](#) can create social confusion that prevents people from intervening in an emergency. You can address this by providing practical, safe and respectful workplace training that educates employees on incivility, outlines policies and promotes being an upstander. [Upstanders](#) prevent harm by calling the police and lending support until help arrives.
4. **Make it clear that under no circumstances should employees try to intervene physically.** There is no way to know if a predator has a gun or a knife. These individuals often operate in a rage; they are not rational and can move from calm to extreme violence without

notice. Your policies and training should provide clear direction on what to do if employees witness domestic violence or believe a colleague is at risk—on-site or in remote situations.

5. **Be honest about your readiness to support employees victimized by domestic violence and take the necessary training.** You may be the first person to notice someone is in trouble. Training to become a [psychologically safe leader](#) includes learning to fulfill your [duty to inquire](#). Also, learn how to build an effective plan to protect the individual and other employees.

[[Access the WSPS Violence and Harassment Toolbox](#).]

THREE PILLARS OF AN EFFECTIVE PLAN

- **Detection:** Once domestic violence is suspected, you should activate your plan — typically with HR — to protect the worker, other employees, and customers from the risk of violence. The steps you take will depend on the situation and perceived level of danger. It may simply involve calling the police to do a wellness check or could go as far as helping the employee get to a safe house. It is about doing whatever is necessary to get the person out of harm's way.
- **Stabilization:** Become a trauma-informed workplace so you possess the knowledge and skills to understand how trauma can negatively impact the individual, their peers and the business as a whole. Connect the employee with the necessary support systems, such as EFAP, psychologists, medical doctors, or shelters, and allow them to take the time they need away from work. The goal is to stabilize the person.
- **Re-entry:** Shame and stigma accompany domestic violence. Trusted leaders understand that they must keep others informed

and engage them in appropriately assisting with their co-worker's re-entry without disclosing confidential information. The quicker the employee can return to a caring workplace and build a new normal, the better. Depending on their mental health, they may return to work gradually and need time off work for therapy. Work with the team to help them return confidently. Whether they've missed days or months from work, they will need support.

CREATE A LIFELINE FOR EMPLOYEES IN GREAT DESPAIR

When you are open and clear that you care about your employees and want to protect them from risks like domestic violence, you are role-modelling the behaviour that all employees should adopt—one that reflects a caring and supportive culture and a zero-tolerance stance on violence and harassment. By building this foundation, you are creating a lifeline for employees in great despair.

Additional Resources

A [WSPS eNews article](#) outlines steps to protect employees, including providing training, watching and listening for signs in person and on phone calls and virtual meetings, being a trusted confidant and directing those at risk to outside sources.

[sheltersafe.ca](#)—connects women with the nearest shelter for safety and support

[Crisis Text Line](#)—connects people in crisis to trained responders 24/7

[MyPlan Canada](#)—a free app to help those experiencing partner abuse

911

Boost ESG performance with psychological safety

I was asked recently to assist the board and leaders of an organization in understanding how they could leverage environmental, social, and governance (ESG) reporting to drive psychological safety accountability. As the chair put it, they were reporting on environmental and governance goals, but wanted to put “more teeth” into actions, accountability and reporting concerning employee well-being and psychological safety.

There is a natural link between these imperatives. An organization’s impact on the environment in which it operates (Environment), its relationships with people (Social), and how its leaders make decisions and establish policies (Governance) have a bearing on employees’ psychological safety.

WHY ARE ORGANIZATIONS FOCUSING MORE ON ESG?

More organizations have focused on ESG since all UN Member States adopted the [17 Sustainable Development Goals](#) in 2019 as part of the 2030 Agenda for Sustainable Development. The 15-year plan is a call to action to end poverty, protect the planet and improve the lives and prospects of everyone everywhere.

The importance of these goals has been magnified as we recover from and transition out of the pandemic and in light of the ever-growing number of people worldwide struggling with financial stress and food insecurity. Creating psychologically safe and inclusive workplaces is a critical step toward improving the lives and prospects of employees.

Start by Setting Realistic Targets

You can use the UN’s goals as a starting point for

figuring out how to support employees. You likely won’t start working on all of them right away. The key is to decide where to begin based on your values, priorities and resources, and as your health and safety culture matures, you will be able to address more goals.

Start by developing a strategy to map out **WHAT** you will do towards inclusion and psychological safety.

The CSA Z1003 Psychological Health and Safety Standard can help you determine **HOW** to get started and continuously improve your efforts using a Plan-Do-Check-Act (PDCA) approach.

See post on creating a workplace mental health [scorecard](#).

Monitor and Evaluate Your Social Impact Regularly

You can use pulse checks and human resource information system data to determine if programs and policies are performing as intended. In your reporting, specify how often you evaluate and the tools you are using. I recommend you review at least monthly.

When reporting, explain how you address each goal through a psychological safety lens to drive learning and accountability and show how success is measured. Include key performance indicators and specify the behaviours and habits encouraged through programs and policies.

To give you some perspective, I’ve broken down a

few of the UN's goals related to social impact with suggestions as to how you might monitor and evaluate progress.

Goal #3: Good Health and Well-being—The focus of this goal is promoting and protecting employees' well-being. This refers to physical and psychological health and factors like establishing prevention programs to mitigate the risk of mental and physical harm and injuries.

You must understand what energizes or drains your employees to protect and promote mental health. Determine the psychosocial factors in your workplace that positively impact or contribute to the risk of psychosocial hazards like fatigue and stress.

Examples of metrics:

- Measure all key psychosocial hazards (e.g., percentage of employees experiencing isolation and loneliness). Why is this important? The United States Surgeon General [suggests](#) that isolation and loneliness are an epidemic and a leading cause of workplace mental health issues.
- Measure employees' self-reported resiliency. The degree to which employees feel resilient, the environmental supports (e.g., caring leaders) they value, and the mental fitness habits that provide personal psychological protection are vital indicators of health and well-being in your workplace.

Goal #5: Gender Equality—Continue focusing on the fundamental human right of gender equality in the workplace. Ensure fair pay, promotions, and career paths and allow for gender differences without judgment. Research [suggests](#) that gender balance among senior leaders is essential because female leaders can promote allyship through an intersectional lens that supports improving the workplace.

Example of metrics:

- Measure the numbers of males and females in your organization who hold positions on the board, executive and leadership teams.

Goal #10: Reduce Inequities—Address present and past inequalities (i.e., reconciliation) to ensure no one is left behind or feels undervalued or disrespected in the workplace. Employers who care can do many things to help employees feel trusted and give them a sense of autonomy (e.g., flexible work arrangements, time management).

Examples of metrics:

- Perceived inclusion levels (i.e., feel welcome, belong) among different populations using an intersectional lens (i.e., neurodivergent, gender fluidity, age, diversity).
- Perceived psychological safety (i.e., feel safe to speak up) through an intersectional lens

Goal #16: Peace, Justice and Strong Institutions—This goal is to create inclusive, safe and welcoming workplaces free from bullying, harassment and violence. OHS and human rights legislation mandates that employers have a duty to protect employees from these forms of discrimination.

Examples of metrics:

- Measure the percentage of employees experiencing acts of incivility (i.e., rudeness) in the workplace.
- Measure the percentage of employees experiencing all forms of harassment and workplace violence.

We expect ESG reporting to continue to grow in the coming months and years. On top of the UN's call to action, many investors are examining what organizations do concerning ESG when making investment decisions.

Paying attention to how you manage psychological safety can significantly impact ESG performance. Organizations that invest in and care deeply about psychological safety will see a return on their investment in attracting and retaining talent, increased productivity and fewer disability claims. You will also enhance your brand and reputation by contributing meaningfully to the UN's Sustainable Development Goals.

The link between safety, inclusion, happiness and productivity is real

When employees feel included, welcomed and psychologically safe, they feel happy; when they're happy, they're more productive.

In 2019, Oxford University and BT, a UK Telecom company, conducted research that provided the first casual field evidence linking happiness and productivity. They found that workers are 13 percent more productive when they're happy.

Employee well-being and happiness are directly affected by feelings of safety, inclusion and belonging.

When employees don't feel physically and psychologically safe, welcomed and included in their workplace, it undermines feelings of happiness and can negatively affect their health. In a recent study I worked on with CSA, we [found](#) that employees who reported low inclusion levels lost more time from work due to sickness and disability.

It's natural for employees to have off days, and it's unrealistic to expect anyone to be happy, focused and motivated 100 percent of the time. However, it is important to pay attention to how often employees have "off days" and to create conditions where employees feel respected and cared for and can work to their full potential.

People must feel safe to speak up and share their thoughts and opinions without fear of retribution, judgment or other consequences that could negatively impact their well-being.

Amy Edmondson [suggests](#) that psychological safety and inclusion are required in the design of

workplace cultures to create conditions for allowing uncertainty and fear to bubble up for discussion, accountability and learning. These factors build equitable, engaging and safe cultures that help employees thrive regardless of age, sexual orientation or skin colour.

POSITIVE STEPS YOU CAN TAKE AS A LEADER

1. **Commit to being a psychologically safe leader.** This is the obvious first step. However, there is no end point; this is an ongoing journey. You must continually build your knowledge, skills and habits to [positively](#) influence your employees' sense of safety, belonging, inclusion and engagement.
2. **Never assume your programs are having the desired impact.** Applying a Plan-Do-Check-Act approach is critical to success. A CSA study [found](#) that employers who planned and instituted programs and policies to positively impact employees' emotional well-being primarily focused on "Planning" and "Doing" but were not "Checking" to see if what was being done was working.
3. **Don't just spread information. Aim to build habits that foster inclusivity.** Don't assume that inclusion-focused training, policies and programs are creating the habits required to support a psychologically safe and inclusive workplace. Information is useless if it does not create habits that address implicit bias, racism and oppression and prevent employees

from feeling included. Build evaluation programs that assess the degree to which inclusive and safe behaviour is being habitualized.

4. **Take stock of and modify bad habits.** Not all habits are beneficial; some can erode trust.

Assessments like the [*Perception of Workplace*](#)

[*Inclusion Quick Survey*](#) can

help you get a snapshot of feelings of inclusion in your workplace. Be open to feedback and ready to address behaviours and habits undermining your efforts. It is better to know how your employees feel and act on their input than to have them remain silent for fear of retribution or because they don't trust that any change will come from speaking up.

5. **Respect different opinions, concerns and points of view.** Consider your employees' point of view in general and in particular situ-

ations raising concerns or stress. Consider how they are acting and what they are telling you. Conversely, consider whether your behaviour and that of other leaders is helping to create an inclusive culture. Be careful of conscious and unconscious biases and your will-

ingness to engage and see situations from all sides.

6. **Evaluate and adjust as needed.** Tools such as the [*WSPS Mental Harm Prevention Roadmap*](#) can help you obtain a baseline on psychological safety for planning and improving your programs and policies.

There is no goal line with psychological safety and inclusion. It requires focus, inten-

tion, learning, accountability and measurement to have an impact. But with the right efforts, you can create a culture that draws people in and makes them feel safe to be themselves and happy to be part of the organization.

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Engaging senior leaders to elevate OHS internal responsibility systems with psychological health and safety programs

All psychological health and safety (PHS) programs require buy-in and support to mature to their full potential. One lens that may help engage senior leadership in implementing an effective PHS program is increases in OHS due diligence fines. Industries like construction, oil, manufacturing, transportation, first responders and health care require robust systems, where OHS standards can mean the difference between life and death.

Some employers are unclear about PHS programs and their value. They see them only as providing employees with mental illness support systems (e.g. employee and family assistance programs and benefits) instead of their primary focus of preventing harm.

COURTS DEMAND EMPLOYERS DO BETTER

Recent court decisions such as *R. v. Greater Sudbury (City)* (2024) and *R. v. Stave Lake Quarries Inc.* (2021) highlight that employers are accountable for ensuring OHS policies and procedures are in place, have been effectively implemented and are audited regularly to ensure they function as intended. Most provinces' OHS legislation guides employers on their duty to protect workers from physical and psychological harm (e.g., harassment).

An OHS system must have conditions that promote a strong internal responsibility system (IRS) to be effective. IRS implies that every employee is responsible for keeping the workplace safe and healthy, regardless of their title or role. Employees trained in OHS policies and procedures must know their three rights: 1) Right to know about hazards and receive safety information; 2) Right to partici-

pate in health and safety solutions; 3) Right to refuse dangerous work.

An OHS program with controls and a Plan-Do-Check-Act approach directly impacts employees' and leaders' actions in accepting their IRS roles.

WHY DO SOME EMPLOYEES FAIL TO FULFILL THEIR IRS ROLE?

Many employees may struggle to fulfill their IRS role due to underlying factors. Understanding these factors and their implications is crucial to fostering a safe and compliant workplace culture.

- **Fear of retaliation:** Employees may avoid reporting unsafe conditions due to concerns about job loss, demotion or harassment, reducing open communication about safety issues.
- **Perceived consequences:** Concerns about damaging relationships with supervisors or being seen as insubordinate can deter employees from refusing hazardous work due to fears of risking their career progression.
- **Lack of supportive management:** A lack of encouragement from management can make employees feel belittled, resulting in disengagement from their IRS responsibilities.
- **Inadequate training:** Training programs may be ineffective if employees feel unsafe or disrespected, as they overlook the emotional aspects of safety and fail to empower workers.

Psychological safety fosters a workplace culture where all employees feel secure expressing their thoughts, concerns and ideas without fearing nega-

tive consequences such as humiliation, punishment or retribution. This sense of emotional safety helps eliminate a fear-driven culture.

When psychological safety is prioritized, employees are positioned for success, leading to an environment where they are more likely to raise safety issues. A psychologically safe culture encourages employees to feel like part of the solution, creating opportunities for collaboration and problem-solving. The foundation for an effective IRS rests on employees' willingness to address unsafe conditions and practices.

Workplaces that have cultivated a culture of psychological safety empower employees to engage openly in safety discussions, report hazards and refuse unsafe work without fear of repercussions. This enhances the IRS's effectiveness and contributes to a physically and psychologically safe workforce.

IRS-minded employees are more likely to view themselves as partners with their employers in enforcing OHS standards with the shared goal of preventing physical and psychological harm. This collaborative environment creates opportunities for continuous improvement in safety practices.

WHAT AN EFFECTIVE PHS PROGRAM CAN DO TO MITIGATE OHS LIABILITIES

- **Financial benefits:** An effective PHS program can significantly reduce financial risks associated with OHS compliance issues, such as costly fines, legal fees and expenses related to workplace injuries and disabilities. Organizations can identify and mitigate risks by promoting a culture that encourages employees to report hazards and engage in the IRS, decreasing liability. A PHS program enhances employee mental health, reduces stress, harassment and bullying, and lowers turnover rates and recruitment costs. Investing in a robust PHS program ensures regulatory compliance and leads to

lower operational costs and improved financial performance.

- **Employee benefits:** An effective PHS program benefits the organization financially and significantly enhances the employee experience. When employees feel psychologically safe, they develop a strong sense of belonging and ownership in their workplace, fostering career growth and investment in their roles. Case studies from various organizations demonstrate that robust PHS programs lead to increased employee engagement and active participation in safety initiatives. In these environments, employees are more likely to take responsibility for their safety and that of their colleagues, report unsafe conditions, and collaborate with management to improve practices. This partnership cultivates a safer workplace and minimizes liabilities, creating a culture where employees and their organizations thrive.
- **Employer benefits:** Organizations prioritizing PHS ensure compliance with regulations and significantly enhance their reputation as responsible employers. By fostering a positive workplace culture, these organizations attract top talent, boost employee morale and improve retention rates. This commitment to employee well-being enhances brand reputation within the community and signals to stakeholders, clients and shareholders that the organization values its workforce. As a result, investing in PHS can lead to increased shareholder value and stronger environmental, social and governance performance. Focusing on employee health reduces downtime and fosters innovation, ultimately driving financial success and building customer loyalty. By promoting a sustainable business model rooted in employee well-being, organizations position themselves for long-term growth and stability.