



## MENTAL HEALTH EDITION

Fostering Mental Health of Accountants: Recent Initiatives and Research

An Accountant's Take on Mental Health and Well Being in the Workplace

It's Blur O'Clock on a Blurday

Understanding and Overcoming the Hurdles of Psychological Health and Safety

Number 9, Summer 2021

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Submissions for the magazine are invited from people with an in-depth knowledge of accounting or finance.

Submissions can be made by email attachment to [info@ThinkTWENTY20.com](mailto:info@ThinkTWENTY20.com). Articles should be in Microsoft Word in 12 pt Calibri Font. They should be 2000 to 3000 words and be well researched as evidenced by the inclusion of references, which should be numbered and included at the end of the article. Bibliographies are also encouraged. Academic papers with extensive mathematical analyses will not be accepted.

#### FOUNDING PARTNER



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## Editorial



*Gerald Trites,  
Editor in Chief*

We have all encountered mental health issues and mental illness, whether it's because we have a family member or friend who has suffered from serious depression, or someone we knew was involved in an accident or traumatic personal event that left serious scars. Or a host of other causes.

Historically, mental health has not received the positive attention it merits. In fact, the historical record is one of the more shameful aspects of our history.

But, over the past few years, there have been encouraging signs of change. Many people are more willing to come forward and discuss their experiences and feelings. Some employers have been stepping up and implementing programs to help people in distress. There is an increased awareness that they can and should take steps to help create an environment that is conducive to maintenance of good mental health and to help those who need help.

The growing awareness of and experience with approaches to mental health in the workplace has led to some worthy research and writing. A good example is "The Healthy Professional Work Research Partnership," which includes 27 researchers from 16 Canadian universities. It is the subject of one of the articles in this special mental health issue. Other articles explore deeply personal experiences with mental health as well as ideas that have been used in the business world.

We have come a long way, but as the saying goes, have a long way to go. There is still a stigma to overcome in some organizations. And, according to the Mental Health Commission of Canada (<https://www.mentalhealthcommission.ca>), the mental-health challenges of working Canadian adults cost employers more than \$6 billion in lost productivity due to absenteeism, presenteeism and turnover in 2011. Many companies are getting the message.

We believe this edition of *ThinkTWENTY20* is an important contribution to the social conversation on mental health and hope that it provides some direction and incentive to action toward creating safe and healthy workplaces.

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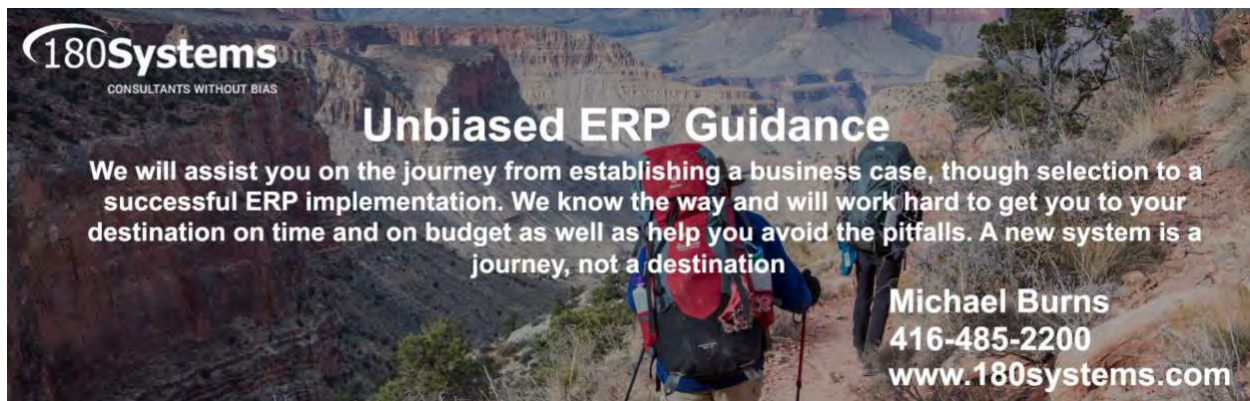


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## **Fostering the Mental Health of Accountants: Recent Initiatives and Research**

*By Merridee Bujaki, FCPA, FCA, Darlene Himick, CFA, and Suzanne Paquette, CPA, CA*

Even before the COVID-19 pandemic, interest in the topic of mental health was increasing among accountants, the accounting profession, accounting firms and accounting academics. COVID-19 accelerated this interest in issues of mental health and work and individual accountants' willingness to speak about their mental health challenges. We are a team of accounting professors actively researching mental health among Canadian accounting professionals. This article reviews recent work on mental health and the accounting profession, what the accounting profession has been doing in this area, recent initiatives by accounting firms, and describes our ongoing study – all with a goal of supporting the mental health of accountants and identifying effective initiatives for fostering mental health and resilience.

### **Benefits of Good Mental Health**

According to the World Health Organization, mental health “is a state of well-being in which the individual realizes his or her own abilities, can cope with the normal stresses of life, can work productively and fruitfully, and is able to make a contribution to his or her community.”<sup>1</sup> Thus, fostering mental health is important not only for individuals, but also for productive organizations and healthy communities. And, yet, the Mental Health Commission of Canada reports that, in any given year, one in five people will personally experience a mental health problem or illness,<sup>2</sup> one in three workplace disability claims are linked to mental health problems or illnesses,<sup>3</sup> and the mental health related costs to the Canadian economy exceed \$50 billion per year.<sup>4</sup> Note that these numbers are prior to COVID-19, so the effects are likely greater in our current times.

### **Recently employers and associations have been paying greater attention to the benefits of mentally healthy workplaces.**

Statistics Canada backs this up with some recent related numbers. They report that the percentage of Canadians over the age of 15 reporting “good or very good” mental health dropped from 68% in 2018 to 54% in 2020.<sup>5</sup> In the same study, women were more likely to report poorer mental health than men (60% of Canadian men reported excellent or very good

<sup>1</sup> <https://www.who.int/news-room/fact-sheets/detail/mental-health-strengthening-our-response>.

<sup>2</sup> <https://www.mentalhealthcommission.ca/English/csrp-news-release#:~:text=In%20Canada%20alone%2C%20mental%20health,and%20safety%20of%20Canadian%20workplaces>.

<sup>3</sup> <https://www.mentalhealthcommission.ca/English/csrp-news-release#:~:text=In%20Canada%20alone%2C%20mental%20health,and%20safety%20of%20Canadian%20workplaces>.

<sup>4</sup> [https://www.mentalhealthcommission.ca/sites/default/files/2020-12/case\\_for\\_investment\\_eng.pdf](https://www.mentalhealthcommission.ca/sites/default/files/2020-12/case_for_investment_eng.pdf).

<sup>5</sup> <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2020001/article/00003-eng.htm>.

mental health compared to 49% of Canadian women) and the gap between women’s mental health and men’s had widened since 2018.<sup>6</sup>

Recently employers and associations have been paying greater attention to the benefits of mentally healthy workplaces. According to Employment and Social Development Canada, these benefits include improved employee performance, enhanced safety and employee well-being, improved recruitment and retention, reduced absenteeism and employee turnover and reduced costs for employee benefits and disability claims.<sup>7</sup>

## Fostering Mental Health

### *Canadian Initiatives*

The accounting profession offers some support to Chartered Professional Accountants (CPAs) in Canada, although the support available varies somewhat across the country. At a national level, CPA Canada has been a partner in the Healthy Professional Work research project (described below) since the project’s inception in 2017. Since at least 2019, CPA Canada has also been profiling mental health matters in online articles in its @Work column, in recent podcasts, interviews, webinars on mental health and articles in its own national magazine, *Pivot*. A notable article in this regard is the cover story in *Pivot*’s March/April 2020 issue, which profiled KPMG’s Chief Mental Health Officer, FCPA Denis Trottier.<sup>8</sup>



Additional attention to this topic was evident at CPA Canada’s virtual The ONE conference in November 2020, when CPA Canada president and CEO Charles-Antoine St-Jean and Denis Trottier sat down for a candid conversation on mental health.<sup>9</sup> Early this year, CPA Canada issued a “Mental Health Policy Framework for Small to Medium-Sized Practitioners”<sup>10</sup> to profile sample policies and initiatives firms can incorporate into their own mental health policy framework. Also included in the document are links to a variety of member assistance programs offered to CPAs through their provincial CPA associations.

### *Provincial Initiatives*

At the time of writing, we are aware of the following Member Assistance Programs offered, or supported by, provincial CPA associations:

<sup>6</sup> <https://www150.statcan.gc.ca/n1/pub/45-28-0001/2020001/article/00003-eng.htm>.

<sup>7</sup> <https://www.canada.ca/en/employment-social-development/services/health-safety/mental-health.html>.

<sup>8</sup> [https://www.cpacanada.ca/-/media/site/pivot-magazine/pdfs/2020/mar-apr/pivot\\_march\\_digital\\_en.pdf?la=en&hash=0CEDD1D941BDD86E33E414486F217BC0B3B8D13D](https://www.cpacanada.ca/-/media/site/pivot-magazine/pdfs/2020/mar-apr/pivot_march_digital_en.pdf?la=en&hash=0CEDD1D941BDD86E33E414486F217BC0B3B8D13D).

<sup>9</sup> <https://www.cpacanada.ca/en/members-area/profession-news/2020/october/candid-discussion-about-mental-health>.

<sup>10</sup> <https://www.cpacanada.ca/-/media/site/operational/ep-education-pld/docs/smp-mental-health-policy-framework-en-final.pdf?la=en&hash=AA3DC96153694A5CCB34D05609E7BB2133E2C1EB>.

1. CPAs, candidates and their immediate families in Alberta and Saskatchewan can reach out to third-party professionals through CPA Assist<sup>11</sup> for support addressing mental health related matters such as addiction, burnout, depression, anxiety, stress management, grief and family or parenting concerns.
2. CPAs, candidates, students and immediate family members in British Columbia and Yukon have access to counselling services and the LifeWorks member assistance program offered by LifeWorks (formerly Morneau Shepell).<sup>12</sup> BC Chartered Professional Accountants also have hosted a series of recent mental health resources that includes articles, infographics and podcasts on mental health.
3. CPA Ontario began offering the same LifeWorks program to its members<sup>13</sup> in December 2020 and has offered online Professional Developments seminars (both paid and complimentary) on mental health at work, including a well attended virtual conversation with Canadian comedian and television host Howie Mandel.
4. CPA Québec offers its own CPA Assistance Program on a user-pay basis, as well as access to the LifeWorks program.<sup>14</sup>

## **Fostering Mental Health – The Big 4 Accounting Firms**

### *In-House Initiatives – Benefits*

More than ever, public accounting firms are promoting mental health in the workplace and raising awareness of well-being. Each of the Big Four accounting firms in Canada has established policies to provide greater support for their employees and family members. Among other things, firms have increased amounts that employees and family dependents can spend on mental health benefits (with 100% coverage), as well as expanded the roster of mental health professionals that can be accessed using these benefits (e.g., psychologists, social workers, psychoanalysts, marriage or family therapists, digital Cognitive Behavioural Therapy, etc.).

For example, in Canada, EY announced in December 2018 that it was increasing its annual mental health benefits to \$5,000 (from \$900) for employees and their dependents,<sup>15</sup> while Deloitte increased the amount from \$300 to \$4,000 in 2019.<sup>16</sup> Similarly, KPMG, through its Total Rewards program, provides support for mental health that includes a firm-funded annual reimbursement of up to \$2,000.<sup>17</sup> As part of its Be Well, Work Well<sup>18</sup> approach, PwC also offers enhanced mental health benefits, as well as a well-being and lifestyle benefit, although a specific dollar amount does not seem to be publicly available. In addition, Deloitte created

<sup>11</sup> <https://www.cpaalberta.ca/Members/CPA-Assist>.

<sup>12</sup> <https://www.bccpa.ca/member-services/benefits-and-savings/counselling/>.

<sup>13</sup> <https://www.cpaontario.ca/cpa-members/benefits-services/map>.

<sup>14</sup> <https://cpaquebec.ca/en/cpa-members/cpa-assistance-program/>.

<sup>15</sup> <https://www.newswire.ca/news-releases/ey-canada-increases-mental-health-benefit-to-5000-701976431.html>.

<sup>16</sup> <https://www.menumag.ca/2021/03/15/from-the-ashes-of-a-pandemic-opportunity-for-a-mental-health-revolution/>.

<sup>17</sup> <https://home.kpmg/ca/en/home/careers/life-at-kpmg/benefits.html>.

<sup>18</sup> <https://www.pwc.com/ca/en/careers/experienced-candidates/why-pwc.html>.



“Recharge” wellness centres, offering fitness, relaxation, massage treatment, mediation and prayer spaces.<sup>19</sup> While pre-COVID-19, these benefits were made available only in person in Montreal and Toronto, a variety of wellness programs are now offered virtually to all employees.

#### *In-House Initiatives – Changing the Conversation*

Accounting firms have recognized that creating a mentally healthy workplace requires more



than financial investments for support and treatment. Challenging the stigma associated with mental health, raising awareness and shifting workplace culture are also important in addressing mental health issues. Recent in-house accounting firm initiatives include the creation of employee inclusion networks and affinity groups such as EY’s Mindfulness Network and PwC’s Differently Abled Wellness Network (DAWN), both aimed at encouraging discussion and sharing of mental health experiences by staff and partners in an

environment where people can talk safely and openly about mental health. Furthermore, EY hosts a Yammer group – a social intranet whereby the firm has developed a scorecard used by their community managers to encourage healthy group use, increase engagement and collaboration at a global level.<sup>20</sup>

Other resources include helplines with 24/7 access to Employee Family Assistance Programs, as well as videos and podcasts. For example, as part of its Live Well program, EY gives employees and their families access to Lifespeak,<sup>21</sup> a mental health and well-being platform that features videos and podcasts on subjects such as preventative health, mental health, stress management and resilience, parenting and caregiving. KPMG’s blog provides extensive information about how to build a “mental health toolbox,” a collection of knowledge, positive habits and resources.<sup>22</sup> In addition, both Deloitte and KPMG are corporate partners of WellCan,<sup>23</sup> an app-based service that offers free well-being resources for Canadians during the pandemic.

#### *In-House Initiatives – Appointing Mental Health Champions*

<sup>19</sup> <http://info.deloitte.ca/en-toronto-workplace-of-the-future?elqTrackId=3cbe776a98814bce92187fea549c15c1&elq=00000000000000000000000000000000&elqaid=396&elqat=2&elqCampaignId=>

<sup>20</sup> <https://digitalworkplacegroup.com/how-ey-measures-yammer-use-webinar-sept-2nd/>.

<sup>21</sup> <https://ey.lifespeak.com/learn?&share=true#/Categories/landing>.

<sup>22</sup> <https://home.kpmg/ca/en/blogs/home/posts/2021/01/invest-in-your-mental-health-toolbox.html>.

<sup>23</sup> <https://wellcan.ca/>.

While a variety of resources are now available, an important question remains: do accounting firms walk the walk? Do employees feel safe in talking about their personal mental health experiences? In creating the role of Chief Mental Health Officer in October 2017, KPMG set the tone from the top. As noted above, former partner Denis Trottier is the firm's first Chief Mental Health Officer. In sharing his own experience with mental illness, Trottier has been instrumental in attempting to break down the stigma associated with mental health. According to Trottier (also a partner to our ongoing research project), "The bottom line is this: mental health is health."<sup>24</sup> Other firms have also appointed partners to lead roles such as Chief Inclusion Officer (PwC), Managing Partner, Talent (EY) and National Mental Health Leader (Deloitte).

### *Client Consulting Initiatives*

Consistent with prior evidence that suggests "there is a return on investment (ROI) for some mental health promotion or illness prevention interventions,"<sup>25</sup> accounting firms are also helping their clients prioritize mental health programs and measure the economic, as well as non-financial, benefits of such programs. For example, Deloitte reports in a recent study that "the median yearly ROI on mental health programs was \$1.62 among the seven companies that provided at least three years' worth of data."<sup>26</sup> Furthermore, this study suggests that the median annual ROI was \$2.18 for companies whose programs had been in place for three years or more.

### **Mental Health among Professional Accountants – A Review of Academic Research**

It is perhaps not surprising that occupational stress, no matter what the occupation, is linked to increases in symptoms of burnout, as well as decreases in overall life satisfaction.<sup>27</sup> But the accounting profession – and how accountants practice their vocation in different settings – has some particular traits that contribute to these experiences.<sup>28</sup>

For example, accounting's seasonality and cyclicity (the "busy season") are particularly stressful, and contribute to burnout, and the high volume of work hours accountants face seem to have a different impact on stress levels depending on whether they occur during busy- or off-seasons.<sup>29</sup> Not only do accountants face a seasonal work cycle, but overall, the escalated workload of public accounting (including unwanted overtime) is a major contributor to employee burnout. Workload affects people in various ways. For instance, it creates tensions between the demands of work and the demands of the home. These tensions are felt as

<sup>24</sup> <https://home.kpmg/ca/en/blogs/home/posts/2021/01/invest-in-your-mental-health-toolbox.html>.

<sup>25</sup> [https://cpa.ca/docs/File/Practice/roi\\_mental\\_health\\_report\\_en.pdf](https://cpa.ca/docs/File/Practice/roi_mental_health_report_en.pdf).

<sup>26</sup> <https://www2.deloitte.com/content/dam/Deloitte/ca/Documents/about-deloitte/ca-en-about-blueprint-for-workplace-mental-health-final-aoda.pdf> (p.2).

<sup>27</sup> Ozkan, A., & Ozdevecioğlu, M. (2013). "The effects of occupational stress on burnout and life satisfaction: A study in accountants." *Quality & Quantity*, 47(5), 2785-2798.

<sup>28</sup> Law, D. W., Sweeney, J. T., & Summers, S. L. (2008). "An examination of the influence of contextual and individual variables on public accountants' exhaustion." In *Advances in accounting behavioral research*. (Bingley, West Yorkshire, England: Emerald Group Publishing Limited).

<sup>29</sup> Sweeney, J. T., & Summers, S. L. (2002). The effect of the busy season workload on public accountants' job burnout. *Behavioral Research in Accounting*, 14(1), 223-245.

conflicts in the roles (or identities) that a person takes on, trying to be many things to many people.<sup>30</sup>

Another specific feature of accounting is its status as a profession. Professions are noted for their traditions of apprenticeship and training, which create hierarchical and structured paths.<sup>31</sup> Accounting is no exception and, as a profession, it has a relatively hierarchical training and promotion structure. Thus, some research tries to understand the stresses at different levels along accounting's career progression. Junior accountants working in public accounting firms, for instance, report that ambiguity and conflicts related to their role increase their job-related tension, which in turn creates feelings of burnout. Once they feel burned out, these accountants not only experience lower levels of job satisfaction, but also lower levels of commitment to the organization. This is a notable finding given the efforts put in to recruiting and "keeping" junior colleagues – it is exactly those dissatisfied and uncommitted employees who are more likely to leave.<sup>32</sup>

Another notable feature of the accounting profession is that accountants face a rapidly changing regulatory environment. Each year, tax codes are amended, new accounting standards are developed and new guidance on existing standards are released. The global push for increased corporate disclosures in a multitude of areas (e.g., new disclosures for environmental, social and governance factors), as well as the traditional demand from the capital markets for more – and more detailed – information, mean ongoing, and sometimes rapid, changes in the information that accountants must collect within the firm, and continual rethinking of how to disclose and report such information.

As well, accountants are tasked with implementing a range of regulatory and related changes that affect different functional areas of the organization. Indeed, it was generally the accountants who were involved in applying for and implementing COVID-related government benefits, and who provided the data needed on requests for payroll subsidies, learning "on-the-fly" how these quickly changing policies functioned. These kinds of changes can lead to burnout,<sup>33</sup> which contributes to accountants' intentions to change their jobs and, indeed, to leave the profession entirely. As just one example, Australian accountants reacted to the introduction of the GST with frustration and intention to leave the profession.<sup>34</sup>

It perhaps comes as no surprise to those who practice accounting, but it is work of great detail with high potential for error without care and attention, which introduces significant financial,

<sup>30</sup> Collins, K. M., & Killough, L. N. (1989). "Managing stress in public accounting." *Journal of Accountancy*, 167(5), 92.

<sup>31</sup> Abbott, A. (2014). *The system of professions: An essay on the division of expert labor*. (Chicago: University of Chicago Press).

<sup>32</sup> Chong, V. K., & Monroe, G. S. (2015). "The impact of the antecedents and consequences of job burnout on junior accountants' turnover intentions: a structural equation modelling approach." *Accounting & Finance*, 55(1), 105-132.

<sup>33</sup> Mete, M., Ünal, Ö. F., & Bilen, A. (2014). "Impact of work-family conflict and burnout on performance of accounting professionals." *Procedia-Social and Behavioral Sciences*, 131, 264-270.

<sup>34</sup> Phillips, J., & De Lange, P. (2006). "The Effect of the Introduction of GST on Accountants' Job Satisfaction and Burnout." *Australian Accounting Review*, 16(40), 52-59.

legal and occupational risks for accountants.<sup>35</sup> This heightened need for concentration, accuracy and attention is physically and mentally tiring – and, when combined with long hours and large workloads, create an environment of pressure that can lead to the main characteristics of feeling burned out: exhaustion, a lack of personal accomplishment and depersonalization.<sup>36</sup>



How accountants perceive their treatment by their firms plays a significant role in both burnout and intention to leave. If they believe that their firms treat them fairly, that may result in reduced levels of burnout and turnover intention; it also increases a commitment to the firms, a point already noted as playing a role in how likely the accountant is to stay.<sup>37</sup> This view – of the firm as a fair (or unfair) employer – continues to play a role even after an accountant leaves a firm, i.e., as an alumni, an accountant who viewed the former firm as fair is more likely to

<sup>35</sup> Ozkan, A., & Ozdevecioğlu, M. (2013). "The effects of occupational stress on burnout and life satisfaction: A study in accountants." *Quality & Quantity*, 47(5), 2785-2798.

<sup>36</sup> Dinc, M. S., Kuzey, C., Gungormus, A. H., & Atalay, B. (2020). "Burnout among accountants: the role of organisational commitment components." *European Journal of International Management*, 14(3), 443-460; Ozkan, A., & Ozdevecioğlu, M. (2013). "The effects of occupational stress on burnout and life satisfaction: A study in accountants". *Quality & Quantity*, 47(5), 2785-2798.

<sup>37</sup> Herda, D. N., & Lavelle, J. J. (2012). "The auditor-audit firm relationship and its effect on burnout and turnover intention." *Accounting Horizons*, 26(4), 707-723.

provide ongoing, voluntary benefits to the firm.<sup>38</sup> So, organizational policies (e.g., mentoring) have a role to play in creating a workplace to which employees feel committed, and this can in turn reduce burnout and their intention to leave.<sup>39</sup>

We note that most of the research on accountants' burnout has been conducted on accountants who work in public practice in accounting firms. These firms exemplify some of the above-noted specifics: professionalized training with hierarchical structures, client demands that are seasonal yet unpredictable, and continually having to learn new regulations and standards that are increasingly complex and for which accountants are hired and viewed as experts.

Research has been focusing for a long while on burnout and on turnover intention, yet these are not the only aspects related to mental health in the workplace (and at home). We still have much to learn to create a deeper understanding of mental health and how accountants experience mental health challenges. Complementing a nuanced understanding of mental health experiences, along with expanding research to consider the experiences of accountants in a variety of settings (e.g., working in industry or government) will strengthen our understanding of approaches that employers, employees and support networks can take in furthering the goal of mental wellness. We are aiming to do just that with our ongoing research project, Healthy Professional Work.

### **Ongoing Research: Healthy Professional Work**

The Healthy Professional Work research partnership<sup>40</sup> is a multi-year research project, funded jointly by the Social Sciences and Humanities Research Council (SSRHC) and the Canadian Institutes of Health Research (CIHR) to examine the nature of mental health issues, leaves of absence and return to work experiences of professional workers in Canada. The project is focused on comparing the mental health experiences of workers of all genders in the following professions: academia, accounting, dentistry, medicine, midwifery, nursing and teaching. This pan-Canadian project, begun in 2017, includes 27 researchers from 16 Canadian universities. As noted in the review of academic research above, there has been relatively little research focus on the mental health experiences of professional accountants to date, other than on burnout and intention to leave the public accounting profession. More than 300 professional accountants responded to our recent survey, and we are in the process of interviewing accountants about their mental health experiences, both before and during the COVID-19 pandemic. We look forward to reporting specific results and recommendations based on our research in the near future. In addition, we are currently identifying promising interventions to support mental health and hope to test the effectiveness of a number of interventions in the remaining two years of the project.

<sup>38</sup> Herda, D. N., & Lavelle, J. J. (2011). "The effects of organizational fairness and commitment on the extent of benefits big four alumni provide their former firm." *Accounting, Organizations and Society*, 36(3), 156-166.

<sup>39</sup> Stallworth, H. L. (2003). "Mentoring, organizational commitment and intentions to leave public accounting." *Managerial auditing journal*.

<sup>40</sup> <https://www.healthyprofwork.com/>.

## Playing a More Proactive Role

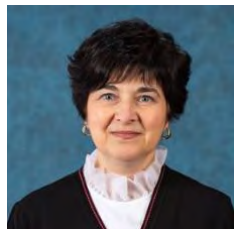
Mental health has been an area of increasing focus in recent years, and this has accelerated during the pandemic. Accounting associations, firms and researchers have identified a number of initiatives to support the mental health of accounting professionals. Most of these initiatives are predicated on individual accountants identifying what resources or accommodations they need, and then seeking them out on their own. For individuals experiencing significant mental health challenges, however, the emphasis on undertaking help-seeking behaviours may add to, rather than mitigate, their stresses. It may be that mental health knowledge and strategies are needed well in advance of a mental health crisis, so individuals know where to go for support when needed. Accounting firms and associations may also have to play a more pro-active role in rethinking the culture and hours of work that contribute to many work-related mental health concerns.



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## An Accountant's Take on Mental Health and Well Being in the Workplace

By Shahrukh Shah, CPA



*Shahrukh (Shak) is a CPA with over 16 years of experience in accounting and finance. He has previously worked for a Big4 accounting firm in progressive roles starting with the audit practice and moving into the Transactions Services space. Shak was diagnosed with bipolar disorder in 2016 and through his recovery process has become a passionate mental health advocate. Today Shak manages his own independent consulting practice and has learned to live and thrive with being bipolar.*

My CPA journey likely sounds similar to many others who have joined the profession out of university. I graduated in 2006 and landed an audit associate role at one of the Big 4 accounting firms in downtown Toronto. Over the course of the next 11 years, I worked my way up the ranks. It was hard work, but rewarding; I thrived on the networking, travel and even the many late nights in the office alongside my peers.

To fully appreciate how my story unfolded, you can begin with my roots as the son of an extremely hard-working single mother who was a low to middle income earner. She sacrificed everything for her son's future. This is where I drew much of my motivation to strive for big goals and to make my mother proud of my achievements.

In many ways, I was an adrenaline junkie. I actually found the intensity of the deals and the consulting work I was doing in my later years quite rewarding, and I fed off the energy from the highs to help power me through those experiences. I also thrived in the late-night partying culture that was prevalent at the accounting firms at that time.

What my teams did not always see was the inevitable crash at the end of an intense project or even in the middle of those projects on the weekends or on my vacations. I chalked it up to my body just needing some extra sleep or downtime to recharge the engines. In hindsight, I was ignoring many of the signs that my body and mind were sending me.

Mid-way through 2016, I was told that my name was going to be put forward for the partnership process – a CPA's dream, right? That's when it happened.

I realize today that “normal” for me is a state of happiness and making time for the things that really matter in my life

### **And Then I Crashed**

In late 2016, I attended a leadership conference and had my first psychotic episode, which led to a bipolar disorder diagnosis. I have often been asked what a psychotic episode even means. In my case, during the tail end of the conference, I began to be overwhelmed by my feelings and started to create a storyline in my head that was removed from reality. I had elements of hallucinations and severe paranoia building up about the intentions of the



people surrounding me. From my perspective, it was frustrating that people were not seeing the things I was seeing but, when I was speaking to those individuals later, it became clear that it was very scary from their point of view as well. To complicate things, I was in Europe when this all happened and my employer had to rush me back to Toronto, escorted by an emergency psychiatrist, and straight into the emergency room.

In all honesty, my first reaction was: what does this even mean and how can I cure this to get back to my “normal” way of life? And most importantly, how do I get back into the partnership process?

Over the next 18 months, I struggled to come to terms with my diagnosis, and even had another psychotic episode at work. It was at that point that I knew I had to take a hard look at my health and what I needed for myself.

### **Being My Best Self**

It hasn't been easy, but what I can say is that I have learned more about myself and what I need for my own wellbeing in the past five years than I had in all the years before. I realize today that “normal” for me is a state of happiness and making time for the things that really matter in my life, centring around my ability to enjoy life to its fullest.

I did not ultimately stay with the Big 4 firm where I was employed, but am excited about starting up my own practice and using work to serve my purpose by inspiring myself and others to be their best self.

Here are a few things that I have learned about myself that may be useful to share in case they resonate with you or someone you know.

1. **Don't be too hard on yourself:** Initially I found it difficult to adjust to not being able to overcome some of the mental blocks that were consuming my mind. I was frustrated and angry with myself for not being able to just shake it off. Learning to let go (or at least minimize) that frustration helped tremendously in my recovery and learning to live with being bipolar.
2. **Set small goals:** It took me a while to realize that I didn't need to save the planet or get back to what I knew as “normal” overnight. Once I started to set goals as small as taking out the garbage to working a 9 to 5 workday, I started to feel a sense of accomplishment and was eager to start working on the next set of goals.
3. **Own your recovery:** I was lucky to have a strong support system surrounding me to help me get back up on my feet. The turning point in my recovery, however, was when I stopped being an observer and consciously took responsibility for making the changes in my life that I knew were needed to help me become as mentally fit as I could be.
4. **Be open to the advice your medical team is giving you:** At first, I struggled to reconcile advice from my doctors with conflicting advice from family and friends. I learned over time that, although your family and friends want what is best for you, they sometimes have a hard time understanding what is being said by the doctors and may provide you with advice based on their own life experiences or limited understanding of your condition. I have achieved a healthy balance over time by hearing what my doctors are saying and incorporating the aspects/medications that make sense to me, while making

my own tweaks that work better for my lifestyle. I educated myself on what living with bipolar really meant.

5. **Embrace the good with living with being bipolar:** While there are certainly things to monitor and be aware of when living with being bipolar, it is a bit of a pet peeve of mine that the word disorder is used to describe this condition. There is a lot of creativity and genius that comes from some of the science behind being bipolar that isn't stressed enough. I truly believe that many of the great things I have been able to achieve in my life are actually a by-product of the so-called chemical imbalances associated with being bipolar. Though my initial reaction was "Oh no is my life over?," I can humbly say that today I am filled with optimism about both my professional and personal future.



6. **Be willing to show vulnerability:** Like many men, I always found it difficult to show emotions of vulnerability and often put up a wall or a tough guy front to protect myself. Over time, this resulted in a fear of failure and not wanting to disappoint my loved ones. I never really spoke with them about my feelings or had those deep conversations, and I definitely did not seek any professional help. I truly believe that a major factor in my recovery process was my ability to be more vulnerable and to begin to put aside my pride to seek the help I needed. What I learned through this process is that, for those who truly love and care for you, nothing takes away from their willingness to help you and, in many cases, it strengthened my existing relationships.

7. **Show your gratitude:** I can't tell you how important this was to my recovery, while also allowing me to strengthen existing relationships with family and friends. From a simple "I love you," or a "thank you," to letters, I found it very therapeutic to express my gratitude to all the people who made a difference in my recovery. The conversations I was able to have with my mother leading up to her passing away last April really were instrumental in helping me through the grieving process, just to know I had expressed my gratitude to her for all she had done. The analogy I like to use is: think about what you would tell people you love in their eulogy and just say it to them while they are alive.

what I can say is that I have learned more about myself and what I need for my own wellbeing in the past five years than I had in all the years before

### **Help Is Available**

I have been asked many times over the years if there was something either myself or my employer could have done to prevent or mitigate what transpired with my mental health. The honest truth is I don't know and never will.

The following discussion is based on my personal opinions as someone who has experienced mental distress and it should be noted I am not a trained professional in the mental health space. But below are a few of my observations on the things I believe employers are doing well today.

- 1. Employee Assistance Programs (EAPs):** I will admit that I never fully appreciated the tools that were available to me when I was working at a big firm. I can assure you that many employers do use an EAP in their mental health programs, and there are many valuable tools available to those who need them. They include, for example, literature around stress management and access to real-time counselling services for employees and any family members who are experiencing personal or mental health difficulties. I would encourage you to familiarize yourself with the tools available through the EAPs and do not hesitate to use them. These services are confidential and are typically available 24 hours a day, seven days a week.
- 2. Wellness/ flexible time-off days:** From my discussions with my peers, it does appear that many professional practices and large corporations offer their employees some flexible time-off days to utilize without providing a reason for the absence. Many encourage you to take this time off for your wellness and to focus on your mental health. I know things can get busy with work but do not forget to consciously use these days by focussing on wellness activities that will recharge you.
- 3. Short-term and long-term disability leaves (STD and LTD):** Many organizations offer these programs and I would advise you to pay attention to the benefits you sign up for as there is often an opportunity to increase your coverage. After both my psychotic episodes, I was placed on STD leave. In both instances, I was sent to the hospital in the psychiatric unit and did not actually realize I was on leave until a few days into my hospitalization. What is great about these programs is that a portion of your salary (often times 60% or more) is covered while you are on leave. Generally, a STD leave can last up to three to six months and then, if you still require time off, you are placed in the LTD leave program. It is comforting to know that a portion of your salary is covered to ease the mental strain of the financial hardship while you focus on your recovery.
- 4. Well-being training programs:** Many organizations are beginning to understand the importance of mental health and wellbeing and are starting to offer employees (not just leadership teams) programs to help them manage their stress through tools such as resilience and mindfulness. It is a great start and I would encourage organizations to continue down this path and keep expanding what is being offered.



Overall, although it pleases me to see the progress we have made the past several years, there is still much work to be done.

### **More To Be Done**

When I reflect on what organizations could be doing better, I truly believe that many organizations' hearts are in the right place. Below are my observations from my personal experience.

- 1. Emotional Intelligence:** The first thing I noticed upon my return to work was the hesitancy of people to have an open dialogue with me on what I was going through. Like many of those who face return-to-work situations, I felt lost and even felt useless, like I wasn't contributing to the team. For many months, my supervisors and peer group members walked on eggshells around me and it took me being vulnerable to truly begin to break down those walls and have that open dialogue with those around me. Organizations need to continue to offer more emotional intelligence training to their leaders and their staff to build trust within teams and encourage open dialogue to help those facing mental health challenges navigate these often devastating times of their lives.
- 2. Leave of absence:** During my leave of absence, I only dealt with the EAP provider and the insurance provider; they required weekly and sometimes daily check-ins to see how my recovery process was going and, ultimately, when I would be ready to return to work. This was quite stressful for me as honestly my breakdown was so significant that I had no clue what was going on with myself, let alone when I thought I would be ready to return to work. I would encourage organizations to work with their EAP providers and insurance companies and develop a more empathetic approach to the leave of absence process to better aid in recovery.
- 3. Return to work:** The transition back to work can be daunting. Oftentimes it is HR that communicates with the employees and develops their return-to-work program. In my opinion, it is critical for the bosses/supervisors to also be involved in this process as they have already built a certain level of trust with such employees and, if they are equipped with the tools and training, will be able to have an open dialogue with those employees on what they need for a return-to-work scenario. The first 30 days are critical to make those employees feel welcomed back and to talk through any anxieties they may feel from being back at work. Open dialogue can also help the employers and employees determine whether a phased approach, such as working one to two days a week, is required initially before the employees return to a full-time schedule and workload.
- 4. Mental health of other employees:** Through my experience and that of my fellow teammates, it was interesting to see the contrast between my two leaves of absence and return-to-work scenarios. During the first leave, the other employees were kept in the dark as to what was going on with me out of respect for my privacy. I learned from many, as I opened up about my story, that they too lost sleep over what was happening with me and felt powerless as to how they could aid in my recovery. During my second leave, however, my boss took the initiative to bring in a workplace psychologist to speak to the team to help answer their questions and walk them through what I may be going through as someone with a bipolar disorder diagnosis. I heard from many of my peer group that this was immensely helpful to their mental health and to better prepare them for interactions with me upon my second return to work.

Overall, although it pleases me to see the progress we have made the past several years, there is still much work to be done. I look forward to being an advocate for mental health and being a voice for those who are not ready to speak up for themselves as they struggle in their day-to-day and work environments.

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## It's Blur O'Clock on a Blurday

By Govindh Jayaraman, Head Coach IMBA Medical



*Govindh Jayaraman founded IMBA Medical in 2015, with a vision of connecting individuals with access to physical and mental health and wellbeing in populations large and small. In 2020, IMBA launched a first-in-Canada employee wellness and chronic disease prevention platform called Healthy @ Home for employers, insurers, and organizations. As the Head Coach at IMBA, Govindh is the driving force behind helping organizations to create and retain a healthier workforce by providing everybody with easy access to the care they need. Reach him at [www.imbamedical.com](http://www.imbamedical.com) or [www.takeaction.xyz](http://www.takeaction.xyz).*

It's almost like a scene from "The Office" or, depending on your vintage, possibly even "Seinfeld."

I can almost imagine it. If we're thinking of "The Office," either Michael or Dwight, or if "Seinfeld," George, sharing how they miss the sound of the door closing at their office on their way out of work at the end of the day. Waxing on about the way the door sounds as it latches, beckoning freedom and fun.

At least that's the image that came to mind when a friend shared a story with me around April 2020. Unfortunately, that's not quite how our script played out. There was no punch line. No laugh track.

**Morning routines have been able to clinically illustrate substantial improvements to mental health, ease anxiety and depression and even improve sleep itself.**

I can't remember if we were having a virtual coffee or a virtual beer. It could have been one of the first virtual birthday celebrations that have now become commonplace. I was sitting down with a few of my friends in two dimensions, sharing a tasty beverage. Most of the people on the call are fairly high-achieving folk, so it didn't take long for the conversation to shift to work.

The themes are predictable. What's new at work? How are you guys handling virtual work? Do you feel more productive? The conversation, however, took a turn that I wasn't expecting at the time.

One of my virtual mates mentioned something unusual in that conversation. "I miss the sound of my door," he said.

I asked him what he meant.

He went on, "I miss the sound that the door makes when I close it on my way out of the office." He mentioned that his boss is a tireless worker and pulled in late hours most days. But, when

his door closed when he was in the office, the day was done and my friend did not need to think about work any longer. It was a physical cue to change gears, essentially physically distancing himself from work. Now, post pandemic and in the remote work world, he felt like he was on call far more often.

The door never closes anymore. And that brings to mind a vitally important question: What happens when we can't close the door on work?

### **Morning Rituals**

Over the past decade or two, there has been an increasing number of research papers and studies that document the value of morning mindset. There have been volumes written about how to build effective morning routines. Waking up early, making your bed and other steps have been coached into human behavior based on these learnings. Army generals, business tycoons and authors have made best sellers out of morning habit rituals and how to build them.

Morning routines have been able to clinically illustrate substantial improvements to mental health, ease anxiety and depression and even improve sleep itself.

Now a year later, after zoom meetings and zoom fatigue, what are the indicators for mental health in the community?



Not good.

The ongoing effects of the mental health pandemic that shadow the coronavirus pandemic are significant:<sup>1</sup>

- 62% of employees report feeling more overwhelmed than before the pandemic.
- 53% feel that the toll of this overwhelms their personal mental health and well-being.

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<sup>11</sup> [https://files.kff.org/attachment/Frontline%20Health%20Care%20Workers\\_Full%20Report\\_FINAL.pdf](https://files.kff.org/attachment/Frontline%20Health%20Care%20Workers_Full%20Report_FINAL.pdf).

- 71% of those working as service providers report negative health impacts of the pandemic and that those to whom they provide services are more argumentative, less appreciative and harder to serve.

Of course, work from home also had some benefits, as reported at the beginning of the pandemic. Many people felt that they were more productive and happier working from home. And, in fact, many people do not wish for the “work from home” benefits to end anytime soon.

The benefits of “work from home” have, however, started to fade. Only 11% of employees feel more productive than a year ago, 35% feel more productive but less engaged, and 55% were both less productive and less engaged. This does not bode well for the much-hyped V-shaped recovery that has been ballyhooed.

### **Why Is the Pandemic Having Such an Impact on Mental Health?**

There are really a number of reasons for this. We are all experiencing some form of trauma related to COVID-19. The constant reporting about news to the never-ending changes of what we are allowed to do and what we are not allowed to do are affecting our collective mental health. This is a phenomenon that is widespread across the globe and affects us in many ways:



***Anxiety and Lack of Sleep.*** Stress and anxiety are feeding poor sleep, which is creating a vicious cycle. The more people lie awake, the more people will feel anxious the next day and, generally, our mental health becomes worse.

***Loneliness.*** There is also the significant impact of loneliness. Social and physical distancing have left people isolated and, while that does not actually affect us all equally, as many of us are still living with our families, it is the variety or the number of people that we interact with that has drastically changed. People who are younger or living alone have truly felt this more than anyone else. And the people who are living with their families in less-than-ideal circumstances have found that pressure to become overwhelming. This has been something that has significantly affected those in the lower socioeconomic strata more severely than those who may be more affluent.

**The constant reporting about the never-ending changes of what we are allowed to do and what we are not allowed to do is affecting our collective mental health.**

***Domestic Abuse.*** Both children and adults who were subject to abuse prior to the pandemic currently have no access to a safe haven. Increasing incidents of domestic abuse and violence have been reported around the world. While scientific surveys are only just beginning, the preliminary results confirm that these trends among those already experiencing domestic

violence have gotten worse in more than 60% of the cases. This comes down to a variety of factors, one of which is obvious. They are spending more time with their aggressors. Adding to this dynamic, their aggressors are also under more pressure financially and from other mental health factors. All of these add up to be compounding impacts to the overall level of domestic abuse.

**Demographics.** While COVID-19 presents greater health risks to older people, early data appear to show that younger people are struggling more emotionally. This is due to several factors, one of which is somewhat simplistic in its concept. If someone is 60 years old and has spent the last 12 to 14 months in relative forms of isolation or physical distancing due to the pandemic, that is less than 2% of their lifetime. On the other hand, if that same period was experienced by someone who is only 10 years old, that would represent more than 10% of their life to date. Moreover, it could start to become a feeling of the isolation being never-ending.

It has also anecdotally been observed that women are faring worse from mental health effects of the pandemic than men. Time and study will be required to understand this impact better.

**Socioeconomic Status.** Income and education play a significant role in the mental health effects of the COVID-19 pandemic because the pandemic threatens the economy of those who are most vulnerable to economic upswings and downswings and are facing the financial realities of the pandemic much more severely. Though politicians around the globe have liked to say that we are all in this together, it is very clear that this is not true from a socio-economic perspective. Individuals and families on the lower end of the income spectrum have suffered more and have been more physically affected by COVID-19 than other groups.

**Racism.** The world over, there are significantly higher incidents of racial violence than there were prior to the pandemic. And, in fact, within particular racial communities in the United States, there have been a higher number of incidences of COVID-19 fatalities and illnesses. For example, research shows that more than 25% of black Americans know somebody who was hospitalized due to COVID-19 whereas that number is only about 10% for white Americans. These social inequalities have significant mental health impacts.

**Work.** One of the most significant disruptions has, obviously, been to our work lives. This could even include students' work lives, for example. While our first responders have taken on the valiant and urgent task of caring for COVID-19 patients, other essential workers at lower income and education levels have also put themselves in harm's way to sell food and otherwise provide essential services that help to keep a community operating. The disruptions to this work/life balance have been substantial and significant. While some of that has turned into increased unemployment, the other significant impact has been the blurring together of hours and days into something that becomes difficult to manage. Work seemingly has no start time or end time anymore. And part of that is because everybody is trying to accommodate the additional challenges of working from home during the pandemic.

And that's where evenfall comes into play.



Flatlining occurs when the body operates in a continuous state of energy, with no intervals of recovery or recharging.

### So, What Is Evenfall?

As the dictionaries explain it:

e•ven•fall ě'vən-fôl"

n. The fall of evening; early evening; twilight.

n. Beginning of evening.

Evenfall is defined as the early evening – the fall of the evening, so to speak. It has been a time of day that has largely been overlooked. Or perhaps, more accurately, it has been overwhelmed. It has been overwhelmed by your afternoon commute, perhaps. Or the rush home to pick up your children and take them to their various activities. This natural oscillation of responsibility from work to family has given people an opportunity to change gears. Nowadays, we seem to operate only in one gear. For most people that gear is starting to burn out.

The COVID-19 pandemic and the opportunities that come with working from home have also overwhelmed evenfall, but in a different kind of way. It has now been overwhelmed by “The Blur.” The Blur is what has happened to time, to boundaries, to our general ability to keep work and home life physically distant. It was only in 2017 when Professor Robert Kelly was famously interrupted by his children and his wife during an interview with the BBC (<https://youtu.be/Mh4f9AYRCZY>). The video of Professor Kelly and his family went viral at the time, but now this sort of situation has become normal.

Fast forward a few years and now it is quite normal to see family in the background of video calls made for work. Dogs barking, kids joining into conversations and waving to colleagues, working from the kitchen table and even getting caught in webcam filters – like the lawyer who became a cat – have become normal. The counterpoint of this collision of work and homelife, however, is the blurring of the lines between when is it time for work and when people are engaging with their families.

The lines of the time of day become blurred, as parents are more likely to have to spend time during the day supporting their children in distance learning activities and perhaps using evening hours for work. Likewise, weekdays and weekends are similarly blurring together.

Some of Gallup's ongoing COVID-19 Panel tracking findings<sup>2</sup> about the “Blur” are incredible:

- Approximately 8 of 10 employees have said they are doing their job differently.
- About half of this group have said the changes have made their jobs harder.

Incredibly, other surveys have also shown that nearly half of all employees are working more hours now than they were before the pandemic.<sup>3</sup> The bad news didn't stop there as working

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<sup>2</sup> <https://news.gallup.com/poll/339824/pandemic-affected-work-life.aspx>.

<sup>3</sup> <https://www.joblist.com/trends/balancing-life-as-a-working-parent-during-the-covid-19-pandemic>.

mothers were more than twice as likely to say that their work-life balance since the start of the pandemic was poor and, likely uncoincidentally, one in four said their relationship with their partner had worsened. Women were also more likely to state that the support they received to promote work-life balance from their employer was poor.

This lines up with a worrying trend in the Gallup poll, which showed that nearly half of all employees felt that their employers were supportive of their well-being early in the pandemic but now that number has dropped to about a third.

Fewer than one in 10 parents say they are less stressed than they were at the start of the pandemic.

Now, back to evenfall. This is the time of day most generally obscured or blurred by the pandemic/work-life balance issues.

Early on, people joked about this with a never-ending parade of memes. Who could forget the coffee cups running relay races with the wine glasses with captions like “This is me ... every day.”

Add to this the lack of a “forced” end of workday routine that could have involved anything from meeting a colleague or client for an after-work drink or meal to managing personal and family responsibilities. All these activities, and their inherent opportunities to add cadence to our days, are gone.

The impact of this lack of cadence and natural oscillation of energy and attention from personal to work life and back again is something well within our control, however, and is a well-known pitfall.

Dr. Heidi Hanna, a neuroscience and brain health expert, *New York Times* bestselling author, instructor of the Brain Health and Performance Course at Harvard Extension School and a Fellow of the American Institute of Stress, cautions against those days when we are forced to go “back to back” in meetings and obligations. “You may think that all that adrenaline is your best friend. But it turns out it’s a fickle friendship,” she explains. “Just as the name implies, flatlining occurs when the body operates in a continuous state of energy, with no intervals of recovery or recharging.”

## Short periods of down time will recharge your body and mind for better balance and endurance.

She goes on to caution against what she calls *brain fatigue*. “Overtaxing certain parts of your brain, like the logical/analytical portion, while undertraining others (creative/reflexive, for example) can leave you feeling out of balance and losing steam. And multitasking, once a badge of honor, is really leading to decreased productivity, leaving you frustrated and stressed.”

The lack of a natural cadence to the day is robbing your brain of the variety of activities that would naturally have occurred when you used to leave the house for the office, walked from your transportation into the office, added lunches, water cooler conversation, surprise

meetings or drop-ins from colleagues or clients and then, of course, rushed home and into evenfall.

Variety is the spice of life, and variety is the cure for all these things.

Morning routines and, just as important, evenfall routines, are essential ingredients to ensuring that our brains and energy levels are naturally able to oscillate between activities and, more important, types of activities. As we change what we do, we change how we're thinking. Staying in "one" zone for too long each day puts us in the zone where our energy flatlines.

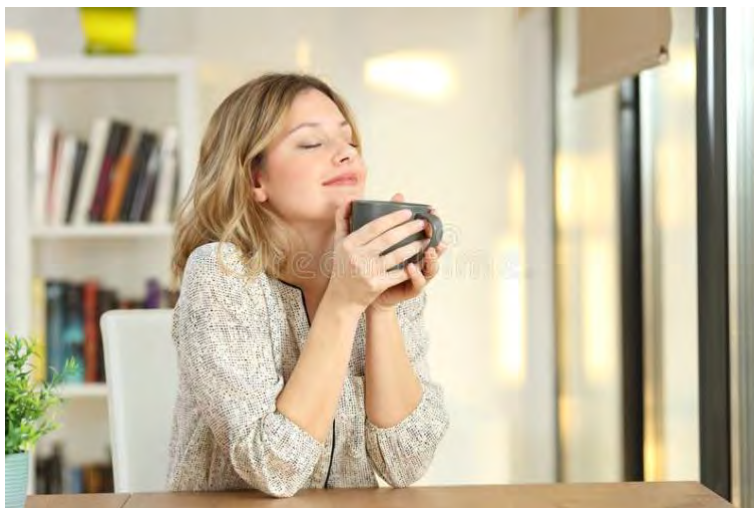
### **So, What Do We Do About It?**

The solutions are remarkably simple to conceive and, likely in equal measure, difficult to implement without the positive peer pressure that supports some of the natural shifts of focus and energy that usually occur during our days. Even the simplicity of your colleagues poking their heads around the corner to wish you "goodnight" or "see you tomorrow" would be helpful. Here are some ideas to try.

**Step 1: Morning Routine.** Build a routine that sets up your day. Researchers from McMaster University joined forces with the World Health Organization (WHO) to study more closely the impacts of COVID-19 stress on students. Many of their recommendations<sup>4</sup> focused on maintaining, or establishing, a morning routine that includes a healthy sleep schedule. They recognized that maintaining a normal schedule is harder during the pandemic, which makes it more essential. It is harder to maintain a regular routine throughout the day if you do not start the day with one.

Start small; create a "wake up" routine where you focus on positive intentions and mindset before you get out of bed. Perhaps take a few minutes to journal about positive thoughts for the day; give yourself an opportunity to not only express but feel gratitude for the day to come.

Then, when you get out of bed, make it. Start your day by ending your sleep. No better way to physically do this than to make the bed.



**Step 2: Take Breaks.** Rather than setting meetings for 30 and 60 minutes, set them for 25 and 50 minutes, respectively. Give yourself 5-10 minutes of alone time, meaning, don't save the time to spend it on more work. Take those 5-10 minutes to reflect, breathe purposefully, stretch, or just walk outside for a moment. Give your eyes and heart a chance to contemplate something else, for yourself, in that time.

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<sup>4</sup> <https://brighterworld.mcmaster.ca/articles/new-study-examines-students-mental-health-and-covid-19/>.

Short periods of down time, applied regularly, will recharge your body and mind for better balance and endurance. You'll have more energy. And making movement a part of your breaks can really help to keep you focused and balance your energy. Another idea is to plan on standing up for all of your phone calls.

**Step 3: Fuel Up.** Making sure you have planned for several small meals and snacks during the day. Focus on nutritious and healthy food whenever possible and watch out for what you are drinking! Too much caffeine and sugar can depress your energy levels artificially and can even affect your sleep.

Did you know that staying hydrated can also help you manage stress and feelings of fatigue in the mid parts of the afternoon?

**Step 4: Evenfall Mindfulness.** Close the door. Build a routine that symbolizes the Evenfall Mindset of leaving the office. Perhaps you could include a short interlude of gratitude (like the one you started with in the morning). Some organizations have group Intranets or Slack channels; maybe you could start wishing people goodnight and signing off for the day intentionally at a regular time. This must be a time that works for your new work/live schedule – but it is helpful to make it a schedule.

### **Regaining Control**

Our team at IMBA Medical wondered if we could support employee mindfulness, help them regain control of their routines and, particularly, support the re-establishment of end-of-day routines.

Can we help them blow the whistle on the end of their day?

Could we remind them to close the door?

To support this exercise, we designed a pilot program and invited a group of participants to join in. Over the course of our pilot, each participant would receive a reminder to engage in a short mindfulness practice, along with a video link, delivered by way of IMBA's proprietary nudging technology called *Take Action*. *Take Action* would send each participant a nudge with a personalized message and a link to video that would align with a theme early each morning and again at evenfall. Participants could select their theme for the week.

Our expectations were based on research that suggested to us that 20-30% would be engaged with our nudges on a weekly basis.

Interestingly, the results showed that all of our pilot participants engaged in the mindfulness nudges weekly. Participants were just about as likely to engage with evenfall nudges as morning nudges which, again, was a surprise as Evenfall Mindfulness is a relatively new concept.

With this early-stage success, we intend to extend our Morning and Evenfall Mindfulness program (MEM Program) to more than 10,000 participants starting this summer.

While we have got a process for this and science to support the nudge techniques we employ, mindfulness is not that hard to put into place.

All it takes is to remember to do it. An alarm or a calendar reminder can help to do the trick. Just wait for the alarm and finish what you were working on. Take five intentional breaths in and out, make each of them as long as you can, just focus on your breath, notice how the air feels coming into your lungs and leaving them. Just breathe. Then close the laptop, close the door, do something else.

Imagine the sound of your door closing, imagine walking out of your building.

Save a moment for yourself.

Imagine you are leaving the office behind.

Embrace evenfall and, perhaps, tomorrow will feel just a little less blurry.



## Understanding and Overcoming the Hurdles of Psychological Health and Safety

By Greg Swaine, Chair, Mind Ally Board of Directors



*Greg Swaine is Chair of the Board of Directors for Mind Ally, a registered Canadian Mental Health Charity. He is a CMHA Certified Psychological Health and Safety Advisor and is considered a subject matter expert in workplace mental health. In 2019, Greg was recognized as one of "Canada's top 15 Leaders Leading Change in Mental Health at Work" by CivicAction. His efforts have inspired dozens of organizations worldwide to follow his lead and change how they approach psychological safety in the workplace.*

The availability of workplace mental health services for employees became a major focus of my life as a result of my own personal work-life experiences. For 20 years, I worked in the services sector, teaching self-defense programs and as a special needs developmental services worker to assist affected children and adults. I was good at it too, until May 5, 2012, when, at work, I unfortunately witnessed a fatal motorcycle accident where I then attempted – unsuccessfully – to save the life of the man involved. To say I was shocked and horrified is probably an understatement.

Following this experience, I looked for help to ease my very troubled mind. I found no services available from my employer and believed that this could mean there were no services available anywhere to help workers like me. And so I went four years with undiagnosed PTSD before finally getting the help I needed in 2016. The help came after family and friends convinced me to get advice on the physical and emotional changes that had been taking its toll on me and my relationships with others since the accident. During those four years where I wasn't seeking help, I missed a significant amount of time from work; at my worst, I missed 73 days of work over a 14-month period.

**In any given year, one in five Canadians experiences a mental illness or addictions problem.**

### **Help at Last**

In commencing my treatment program and beginning to feel better, I was invited to serve on a committee that our organization had created to improve organizational health and culture. I proposed a workplace wellness plan for our employees and offered to conduct the research and help operate the program. Six months later, I presented my proposed plan to senior management, and it was readily accepted. My employer became the first Developmental Services Agency in Canada to implement the National Standard of Canada for Psychological

Health and Safety in the Workplace (The Standard)<sup>1</sup> and to sign the Declaration of Commitment to The Standard. The Standard is a first of its kind in the world: a set of voluntary guidelines, tools and resources intended to guide organizational capacity to promote mental health and prevent psychological harm at work.

The current state of mental health in Canada is as follows: In any given year, one in five Canadians experiences a mental illness or addictions problem. By the time Canadians reach 40 years of age, one in two have – or have had – a mental illness and/or addiction.<sup>2</sup> There is consistent evidence that certain workplace situations, including occupational uncertainty, excessive job stress and lack of value and respect in the workplace, are associated with an increased risk of common mental disorders.<sup>3</sup>

Let's consider the future of the Canadian workforce and take note of who our future leaders and employees are: young people aged 15 to 24 are more likely to experience mental illness and or substance abuse disorders than any other age group.<sup>4</sup>

The time is now for positive change in how we will support workplace mental health. The speed in which to reach this critical and life-saving goal will depend on how our business, government and community leaders approach and understand mental health programming within their respective work environments.

So how do we take the workplace, where 47% of Canadians say they spend the most stressful part of their day,<sup>5</sup> and tactfully make it easier for them to navigate their specific jobs and employer/employee relationships on a day-to-day basis?

### **How to Use These Statistics to Make Sense of Current Trends in Your Organization**

Researchers at Simon Fraser University have found 13 psychosocial risk factors “based on extensive research and review of empirical data from national and international best practices; these risk factors were also determined based on existing and emerging Canadian case law and legislation.”<sup>6</sup> These risk factors will affect the overall health of every organization, the health of individual employees, the financial bottom line and how employees can perform their day-to-day tasks with commitment, ingenuity and effectiveness.

<sup>1</sup> <https://www.csagroup.org/article/canca-s-z1003-13-bnq-9700-803-2013-r2018/>.

<sup>2</sup> Smetanin et al. (2011). *The life and economic impact of major mental illnesses in Canada: 2011-2041*. Prepared for the Mental Health Commission of Canada. Toronto: RiskAnalytica.

<sup>3</sup> Harvey, S. B., Modini, M., Joyce, S., Milligan-Saville, J. S., Tan, L., Mykletun, A. & Mitchell, P. B. (2017). *Can work make you mentally ill? A systematic meta-review of work-related risk factors for common mental health problems*. *Occup Environ Med*, oemed-2016.

<sup>4</sup> Government of Canada (2006). *The human face of mental health and mental illness in Canada*. Ottawa: Minister of Public Works and Government Services Canada.

<sup>5</sup> Morneau Shepell. (2017). Media Room. Morneau Shepell finds organizational change linked to physical and mental health sick leave.

<sup>6</sup> Merv Gilbert, Dan Bilsker (2012) *Psychological Health and Safety: An Action Guide for Employers*. Vancouver: Centre for Applied Research in Mental Health & Addiction (CARMHA), SFU Faculty of Health Sciences.

The 13 risk factors are:

1. Organizational Culture
2. Psychological and Social Support
3. Clear Leadership and Expectations
4. Civility and Respect
5. Psychological Demands
6. Growth and Development
7. Recognition and Reward
8. Involvement and Influence
9. Workload Management
10. Engagement
11. Balance
12. Psychological Protection
13. Protection of Physical Safety

A full breakdown and review of each psychological factor is available at the Canadian Centre for Occupational Health and Safety.<sup>7</sup>

So now that we know the risk factors that can contribute to the mental health of our employees and we also understand the statistics of mental health in working-age Canadians, where do we go from here?

### **Learn Where You Stand**

To gain an understanding of where your organization stands regarding its psychological health is a relatively inexpensive process. One can determine an organization's score by completing a free organizational audit, which considers current policies and procedures and administering a free and confidential assessment survey. Both the audit and survey are issued by Guarding Minds at Work and are available for download on their website.<sup>8</sup>

**Establishing a psychologically safe workplace humanizes an organization. It provides relief for all current employees, allowing them to be healthier and perform better in the workplace**

Setting up the survey can take about 30 minutes if one is familiar with the organization. The survey takes about 15 to 20 minutes for each employee to complete and it takes only minutes to close off the survey and download the results, which will provide aggregated data reports and side-by-side analysis of where the organization stands against the average score of other

<sup>7</sup> [https://www.ccohs.ca/oshanswers/psychosocial/mentalhealth\\_risk.html](https://www.ccohs.ca/oshanswers/psychosocial/mentalhealth_risk.html).

<sup>8</sup> <https://www.guardingmindsatwork.ca/resources>.



Canadian organizations. At this stage, one can start implementing a framework for the low scored areas and start aligning the organization with The Standard.

It is highly recommended that, before administering the survey, management develops an appropriate communication document to inform all employees of the plan to implement a workplace wellness strategy in order to optimize their trust and support. Many employees have stated that they would not tell their current manager about their mental health problems,<sup>9</sup> so, to create a clear statement explaining what the survey is, how their privacy is protected and how the data will be used with clear lines of confidentiality will be a crucial step in the development and implementation process. With more data collected comes a more efficient action plan that can be efficiently and effectively implemented to address any problem areas.



Establishing a psychologically safe workplace humanizes an organization. It provides relief for all current employees, allowing them to be healthier<sup>10</sup> and perform better in the workplace<sup>11</sup> while setting up a secure workplace for future employees to join. Further to the above, those exploring new employment opportunities and the next generation of employees are becoming more likely to ask employers if they have a psychological safety plan for employees before accepting a position with them.

This helps to prove that workplaces need to invest in initiatives that promote positive workplace mental health to reduce psychological distress and protect employees from the negative impact of job stress and other risk factors.

### **Costs Associated with Doing Nothing**

What happens when we don't implement workplace mental health strategies for our employees? The costs associated with mental illness (in terms of absenteeism, productivity losses, indemnities and healthcare) were estimated at \$51 billion in Canada in 2003. The estimate is that, by 2041, the cumulative cost of mental illness in Canada will be \$2.5 trillion.<sup>12</sup> What are the costs to be encountered by each organization? Want to find out for sure? Try out this "Cost of doing nothing" (CODN) calculator.<sup>13</sup> This calculator estimates the cost of employee workplace mental health due to lost productivity and then compares these costs to the estimated amount being invested in programs and policies. The end goal is to provide a lens on the "cost of doing nothing" and to gain insight into the current state of an organization.

<sup>9</sup> Dewa, C. S. (2014). "Worker attitudes towards mental health problems and disclosure." *The international journal of occupational and environmental medicine*, 175-185.

<sup>10</sup> Ipsos Reid. (2017). Workplaces that are implementing the National Standard of Canada for Psychological Health and Safety in the Workplace Described by Employees as Psychologically-Safer Environments.

<sup>11</sup> Lowe, G. (2014). *The Wellness Dividend: How Employers Can Improve Employee Health and Productivity*. Kelowna: The Graham Lowe Group INC.

<sup>12</sup> Lim, K. L., Jacobs, P., Ohinmaa, A., Schopflocher, D., & Dewa, C. S. (2008). "A new population-based measure of the economic burden of mental illness in Canada." *Chronic Diseases in Canada*, 92-98.

<sup>13</sup> The Cost of doing nothing calculator. <https://ca1se.voxco.com/S2/s>.

What is preventing organizations from starting their own psychological safety programs? There can be many different reasons ranging from not wanting to risk professional embarrassment to not understanding how to undertake the process or to determine the investment that may be required. Let's discuss this further so that we can see things more clearly.

I worked as a front-line employee with little knowledge of mental health programming when I started my workplace mental health journey. While one needs little related knowledge to implement The Standard or any other kind of employee wellness program, having a keen interest in starting a program is essential to begin the process. Not knowing where to begin and also not having the budget to support the planning and process was my experience. The Standard was designed to be adapted to any size organization with any sized budget. There is no set timeline that needs to be followed, so there is no need to allocate major funding to the project to tick off all the boxes. It actually doesn't work that way.

### Prioritizing the mental health of employees can have far-reaching financial benefits for businesses.

Psychological safety in the workplace is a journey, not a destination. Completing the Guarding Minds audit and survey, finding the organization's problem areas and starting a framework to get the organization on track to align with The Standard is all part of a continuous flow of organizational growth and development. As an organization grows and changes, so will the complexities and issues around employee psychological health. Monitoring your organization's trends will allow you to stay agile and adapt to your employee's health changes as they arise. This allows for a smoother transition during organizational change, improved quality of service and performance,<sup>14</sup> employee retention and decreased absenteeism, long and short-term disability claims<sup>15</sup> and even reduced workplace accidents.

A hurdle to overcome – which is also a significant concern for senior management and other management level employees – is how this workplace wellness initiative will affect their current workload? The good news is that it actually will make things easier for them. Four in five managers believe it is part of their job to intervene with an employee showing signs of mental illness or addictions. While 55% of managers reported intervening, only one in three report having had appropriate training to do so.<sup>16</sup> Furthermore, 65% of managers say they could do their jobs much more effectively if they could find ways to manage distressed employees more efficiently and with greater organizational support.<sup>17</sup>

#### **Bringing all of The Pieces Together**

According to a study by Deloitte Canada, prioritizing the mental health of employees can have

<sup>14</sup> Royal College of Psychiatrists. (October 2010), *No health without mental public health: the case for action*, 7-10.

<sup>15</sup> Dewa CS, Hoch JS, Carmen G, Guscott R, Anderson C. "Cost, effectiveness, and cost-effectiveness of a collaborative mental health care program for people receiving short-term disability benefits for psychiatric disorders." *Canadian Journal of Psychiatry*, 2009; 54(6):379 - 388.

<sup>16</sup> Ipsos Reid. (2012). *Emotional Intelligence at Work*.

<sup>17</sup> Ipsos Reid. (2012). *Ibid* .

far-reaching financial benefits for businesses. Companies in Canada with mental wellness programs for workers for at least one year experienced a median annual return on investment (ROI) of \$1.62 for every dollar invested. Meanwhile, organizations that had similar programs in place for three or more years enjoyed a median annual ROI of \$2.18 for every dollar invested.<sup>18</sup>



We know how to get started and which tools are available. We understand the foundation that needs to be laid and the positive benefits that it will bring once it starts. But is the organization ready to begin this project? For various reasons, some organizations won't be at this stage yet. It could be anything from current labour disputes, going through layoffs, financial reasons or due to limited resources to dedicate to the process. Ensuring that an organization is ready to take on the project is critical to its overall success. There is no shame in acknowledging the need for a program while waiting for the appropriate time to develop and implement it.

#### **Services Available to Help Promote Wellness**

But what if there is still hesitation to initiate a workplace mental wellness program? The good news is there are services available that can help with every step of the employee wellness journey. Mind Ally,<sup>19</sup> a Canadian registered charity established in 2013, offers a full range of Psychological Health and Safety services in the workplace. The services range from completing an organizational assessment to implementing and maintaining an organization's long-term mental health programming and everything in between. The benefit of taking advantage of these services is that a secure and qualified third-party advisor can complete organizational workplace wellness reviews, give accurate needs assessments and save management time.

With flexible workplace wellness service options plus a good communication approach to inform employees of the new plan, an organization will increase the likelihood of a higher engagement rate and more honest responses from employees, providing the best possible outcomes to establish a successful path toward organizational worker wellness.

Also, Mind Ally will provide the best advice on which relevant products and services to acquire to achieve the organizational goals without incurring a trial and error process with the different available programs.

Finally, implementation and ongoing maintenance plans for the mental wellness program are available. Therefore, Mind Ally can develop and organize the program launch and kickoff, help adapt the program to address current trends and needs as they arise and provide ongoing

<sup>18</sup><https://www2.deloitte.com/content/dam/Deloitte/ca/Documents/about-deloitte/ca-en-about-blueprint-for-workplace-mental-health-final-aoda.pdf>.

<sup>19</sup><https://mindally.org/>.

support. Because each company is different, no one size fits all when it comes to addressing workplace wellness needs. Mind Ally can help achieve each organization's long term wellness goals to provide employees with a safe, secure and healthy work environment and to reap the future benefits that come along with promoting that type of environment.

Mind Ally's Workplace Mental Wellness advisory services are driven by Canadian Mental Health Association certified Psychological Health and Safety Advisors, along with appropriate training and programs. This certification qualifies Mind Ally professional advisors to design and deliver Workplace Mental Wellness plans and programs aligned with the National Standard for Psychological Health and Safety in the Workplace. Mind Ally can advise on current programs or create new programs for any sized organization with any sized budget. Mind Ally, with a reputation and wide recognition for its expertise in Workplace Mental Wellness programming services, is often invited to speak at workplace wellness events and conferences coordinated by organizations such as ThoughtExchange, Unsinkable, Never Alone and Simon Sinek's Inspired Safe and Fulfilled.

### **A Better Life for All**

Since joining Mind Ally in March 2020 and being appointed as Chair of the Board of Directors in July 2020, my prime role is to lead and direct the Mind Ally Workplace Mental Wellness fee-for-services program and conduct a "train-the-trainer" program for new Advisors to deliver our Workplace Mental Wellness services to workplaces across Canada. I take immense pride in how we effectively help many organizations and their employees to become psychologically safe and healthy. We are giving them tools that they can use both at work and in their personal life. In doing so, we are improving the quality of life for thousands of people in their daily work lives.

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## Keeping Your Brain Healthy

By Jonathan Andrews, CPA



*Jonathan Andrews, CPA, lives in Victoria, BC. He is the owner of Netlearn.ca, a provider of e-learning content and delivery services.*

The World Health Organization defines mental health as “a state of well-being in which the individual realizes his or her own abilities, can cope with the normal stresses of life, can work productively and fruitfully, and is able to make a contribution to his or her community.”

Two methods of addressing mental health are: *extrinsic*, believing that the solution to mental health is beyond our control and needs to be influenced by the intervention of others, or *intrinsic*, where we can achieve a state of contented mental health through our own conscious direction.

“Between stimulus and response, there is a space. In that space is our power to choose our response. In our response lies our growth and our freedom.”

*Viktor Frankl, Austrian neuroscientist and Holocaust survivor.*

### Cue the Brain

There is a specific, albeit complex, relationship between different parts of the brain, each of which has a distinct function. Concerns about mental health can often arise when these functions do not work well together.

A recent discovery about the brain is that it consists of several distinct zones, each with a different purpose. Further research using functional Magnet Resonance Imaging (fMRI) confirmed this. When a subject receives stimulation, the fMRI detects and maps fluctuations in blood flow. This finding led to a second discovery: distinct areas of the brain can expand through increased use, in the same way as a human muscle responds to exercise. This has become known as *plasticity*.

These two discoveries form the basis of Dr. David Rock’s book *Your Brain at Work*. The author’s overall message is that you can change aspects of your brain through conscious choice and retrain your brain for the future.

*Your Brain at Work: Strategies for Overcoming Distraction, Regaining Focus, and Working Smarter All Day Long*, by Dr. David Rock, was originally published by HarperBusiness in 2008; an updated version by HarperCollins Publishers followed in 2020. The book length is 247 pages, plus notes and glossary; the audio version lasts nine hours and 24 minutes, and the publisher provides the glossary on a PDF.

“Know Thyself” was inscribed on a temple in Delphi, Greece, over three thousand years ago, and represents a fundamental and timeless philosophical belief. “Know your Brain” is the first

phrase on the front cover of this publication. This book explains why the latter has become the neuroscience equivalent of the former.

Subsequent phrases on the book's cover promise that the contents will help us optimize performance, overcome distraction, regain focus and work smarter. Dr. Rock points out that we can achieve these kinds of benefits through a greater understanding of how the brain works, in both office and home environments.

The author's tone is enthusiastic and upbeat. Periodic references to neuroscience terms throughout the text are well-placed and informative. The content is well-structured and eminently understandable.

Let's take a brief look at how Dr. Rock explains the ways to apply the many complex aspects of the brain productively and beneficially.

### **Your Brain at Work**

The author structures the book into "scenes" and "acts." Thoughts uppermost in our minds, holding our immediate attention, are the "actors." The mind space in which they perform is the "stage." Memories and routines that we rely on are the "audience." Supervising and controlling all the above is the "director." The author's approach is innovative. He introduces the reader to the complexities of the brain in a way that enlightens and informs, providing comprehensive guidance for a journey into what may well be new and unfamiliar territory for the reader.

Dr. Rock focuses on two principal characters, Emily and Paul, and their two children, Josh and Michelle. A large organization employs Emily as a conference planner; Paul works as a home-based IT consultant. Each scene begins with either Paul or Emily in a typical business or home life situation, one that inevitably does not work out too well. This provides the opening for Dr. Rock to step in and analyze what happened, explaining what went wrong and introducing us to the underlying neuroscience. Having provided the insight, the author then replays each scene. This time, Emily and Paul use their brains more productively. Dr. Rock continues this pattern throughout the book to great effect.

### **Act 1: Problems and Decisions – Scenes 1 to 6**

Scene titles: "Morning overwhelm," "A new project," "Juggling five things at once," "Saying no to distractions," "Searching for peak performance" and "Getting past a roadblock."

In these first scenes, Dr. Rock takes daily challenges experienced by Paul and Emily and explains how certain parts of the brain influence their activities. Typical problems they encounter are, for example: (a) the stress that can occur by being overwhelmed by too many tasks and conflicting priorities, (b) avoiding distractions and (c) becoming easily derailed (a characteristic of today with so much computer-based work). The author identifies the parts of the brain that are causing problems and spells out the solution. In doing this, he reinforces the point that we can control the various parts of our brain that are working against us.

### **Intermission: Meet the Director**

Act 1 has more scenes than any of the other acts and so it is time to step back. In doing so, Dr. Rock switches from specific examples at ground level to a “meta-cognition” level where we can watch the brain at work. It is at this higher level that we can see how the various parts of the brain respond to both internal and external stimuli.

The author introduces us to the significance of “mindfulness,” defining this term as paying attention to what is happening in the present in “an open and accepting way.” The author highlights the drawbacks of reacting automatically to situations by relying on “memory maps.” He explains that we have accumulated these “maps” of stored experiences throughout our lives, enabling us to respond immediately to given situations. These instinctive responses, while extremely beneficial and timesaving most of the time, can periodically cause adverse reactions in others, not good for us or for them.

### **Act 2: Staying Cool under Pressure – Scenes 7 to 9**

Scene titles: “Derailed by drama,” “Drowning amid uncertainty” and “When expectations get out of control.”

In these next chapters, Dr. Rock focuses on various emotional responses to situations. He explores the complexity of human emotions, referring to our typical response as either perceiving a “threat” or a “reward.” He explains the significance of instinctively running *towards* a reward or *running away* from a threat.

In the work environment, the author highlights the positive consequences of autonomy, control and certainty. This is in direct contrast to the detrimental feeling of uncertainty and loss of control, which can, and does, cause much stress. With an increased sense of autonomy, control and certainty comes the confidence and power of making choices. Dr. Rock explains how, once you realize that “oh, that’s just my brain,” you can choose to switch from an instant, knee-jerk reaction to a more effective, well-considered response.

In the last scene of this Act, Dr. Rock describes the advantages and disadvantages of expectations. Realistic expectations can carry us through hard times, in sharp contrast to the corrosive effect of unrealistic, unmet expectations. Previous experiences have an essential role to play in developing realistic expectations.

### **Act 3: Collaborate with Others – Scenes 10 to 12**

Scene titles: “Turning enemies into friends,” “When everything seems unfair” and “Battle for status.”

The author reminds us that the brain is a social animal. In social situations, potential rewards and threats activate the same neural networks. If there is a feeling of connectedness to another person, it is a reward; if there isn’t, it’s a threat. That’s how the brain sees it and, as a result, collaboration can be difficult. Dr. Rock explains that, by understanding how the brain works in this way and adjusting your response, it is possible to create a friend out of a potential enemy.

Concerns about status brings its own threats and rewards. And there are fewer places where concerns about status are more evident than in the office! When in you are such sensitive situations, the author explains that, by focusing on rewarding the status of others, you can reduce the likelihood of perceived threats, consequently defusing potentially damaging relationships.

#### **Act 4: Facilitate Change – Scenes 13 to 14**

Scene titles: “When other people lose the plot” and “the culture that needs to transform.”

In the last two scenes, Dr. Rock switches perspective, away from the reader’s brain. He describes how to influence change in others, individually and as a group. The traditional method of providing feedback is not always successful, often being sensed as a threat. The author explains how, by “putting on the brakes” in your own thinking and drawing out a positive response in others, you can encourage them to provide their own feedback.

Transformation in yourself and in others can be immensely beneficial, but the changes needed to achieve this can be hard. Dr. Rock explains that the answer lies in maintaining focus and gaining the full attention of others. By encouraging their collaboration, changing yourself and repeating this newly updated behaviour, you can achieve so much more.

#### **Encore**

The author concludes with an excellent summary, capturing and building on the key points made throughout the book. He delivers his message in an easy, relaxed and confident manner, with well-timed touches of humour.

Throughout this publication, Dr. Rock provides a great deal of information, basing the content on extensive research, together with practical applications to daily life. And, if the meaning of neuroscience terms, such as “dopamine,” “pre-frontal cortex” or “mirror neurons” escape you, there is an excellent glossary at the end.

#### **Great Insights When Your Brain Is Working**

You may accept that you can direct the state of your own mental health, that you can influence how the different functional areas of the brain react and respond to everyday situations. You may feel, however, conscious redirection of different parts of your brain is not possible and that this type of information is *not* for you.

Either way, taking the time to step back and analyze why you reached this conclusion would provide great insights. This is, after all, as Dr. Rock would agree, your brain at work!





## Hey! What's New? – Special Edition on Employee Wellness

By Gundi Jeffrey, Managing Editor



*Another random collection of interesting stories, this time related to this issue's theme of mental wellness in the time of COVID-19. There are some surprising facts and a lot of good advice here.*

### **U.S. And Canadian Workers Are Among the Most Stressed in The World**

A CNBC news report, dated June 15, 2021, says that U.S. and Canadian workers are some of the most stressed employees in the world, according to Gallup's latest *State of the Global Workplace: 2021 Report*, which captures how people are feeling about work and life in the past year.

U.S. and Canadian workers, whose survey data are combined in Gallup's research, ranked highest for daily stress levels of all groups surveyed. Some 57% of U.S. and Canadian workers reported feeling stress on a daily basis, up by eight percentage points from the year prior and compared with 43% of people who feel that way globally, according to Gallup's 2021 report.

This spike isn't surprising to Jim Harter, Gallup's chief workplace scientist, who told CNBC that "rates of daily stress, worry, sadness and anger have been trending upward for American workers since 2009. Concerns over the virus, sickness, financial insecurity and racial trauma all contributed to added stress during the pandemic."

But, according to the Gallup report, stress spikes were especially acute for women in the last year: 62% of working women in the U.S. and Canada reported daily feelings of stress compared with 52% of men, showing the lasting impact of gendered expectations for caregiving in the household, ongoing child-care challenges and women's overrepresentation in low-wage service jobs most disrupted by the pandemic. By contrast, the daily stress levels for women in Western Europe went down in the last year, which researchers attribute to social safety nets for parents and workers to prevent unemployment.

And while employee engagement dipped in the rest of the world, it rose to 34% in the U.S. The correlation of higher engagement but also higher stress can result in burnout and mental health challenges and indicates that "the intersection of work and life needs some work," Harter says.

Get the report at [State of the Global Workplace Report - Gallup](#).

## Effective Ways to Relieve Stress at Work

In an article in *SmartBrief*, dated June 16, 2021, LaRae Quy describes stress as your physical and mental reaction to what you perceive is happening. “The majority of stress is created by how you view your world,” she says, “and yourself. If your perception doesn’t meet your expectations, you feel stressed.” But she believes that you have the ability to relieve your stress “because your enemy is not external; stress is an inner battle, and only you can decide how to control it.”

Quy then describes four effective and easy ways to relieve stress at work:

**1. Differentiate between stress and anxiety.** “People often interchange the words stress and anxiety, as though they were one and the same. While the symptoms can be similar, there are distinctions. Stress rears its ugly head when the tasks at hand are perceived to be more than we can handle. We feel overwhelmed and try to juggle several roles or projects throughout the day as our to-do list lengthens.”

Anxiety, on the other hand, she describes as “more intense and happens when stress is not acknowledged or managed. Anxiety tends to linger long after the perceived threat or challenge has passed. It’s essential to recognize your stress first so you can manage it before it morphs into anxiety.”

How to make this work for you:

- Do not resort to multitasking to get everything done. You may believe you’re helping yourself but in reality, you’re only creating more stress.
- Develop self-awareness to recognize stress. Identify how you typically respond to the unexpected in both life and business. Understand your limits and triggers.
- Nip thoughts and behavior that feed your anxiety in the bud.

**2. Practice mindfulness.** According to Quy, “being present is key if we want to control our stress. When we let our thoughts free-float, we can end up in a cesspool of fear and regret. It’s ugly and self-defeating because that type of thinking always stinks.” She adds that “present-moment awareness involves paying attention to the present rather than trying to predict future events or dwell on the past.... if we’re aware and present in the middle of stressful situations, we’re more likely to be resilient because our attention is focused on the matter at hand rather than wasting precious energy on other things.”

How to make it work for you: Slow down. You don’t need to stop but you do need to notice what is in front of you, whether it’s eating a meal, working on a project, taking a walk, or talking to a friend. Mindfulness is simply paying attention to what is going on in the present moment. Work through your problem now, in the present, rather than let your thoughts dominate your mind and drive you crazy!

**3. Separate your life into piles.** Quay points out that, “once you come to terms with the things in your life that are not under your control, the more time you have to focus on the things that are. When you place the things in your life into separate piles – those you can control and those you can’t – it helps you allocate your resources more productively and efficiently. Put more time and energy into the things over which you have influence.”

How to make it work for you: Take action because stress can become debilitating if you let it fester. Allocate your time and energy in a wise manner; focus on the things over which you have influence and control.

**4. Get serious about a hobby.** Hobbies provide a slice of focus and attention that is not tethered to our work life. “Ironically,” Quay says, “people who are overwhelmed often do not give themselves permission to take a break from their busy schedule. It takes all the running they can muster just to stay in place. Good hobbies, however, provide a break with a purpose. It’s not about sitting around and twiddling your thumbs; whether your hobby is gardening, cooking, painting, or restoring vintage cars, your downtime is being used for something productive.”

How to make it work for you: Follow these tips:

- Choose something that is relaxing but also challenges your mind.
- Find something that is productive and gives you satisfaction.
- Make it colorful. Color has strong effects on your brain.

For more of Quay’s advice, check out [Effective and easy ways to relieve stress at work | SmartBrief](#).

## **How to Protect Employee Wellbeing During Covid-19**

While the Covid-19 crisis has hit organizations very differently, the single common factor for everyone is that life is infinitely more stressful. According to a recent article on the EY Canada webpage, “essential frontline workers are running harder and faster against the backdrop of an invisible and potentially deadly risk. Beyond keeping people physically protected, employers must also manage staff exhaustion and the stress that comes from the pressure to perform during a crisis. Many will have feelings of guilt if work prevents them from being able to care for own family – others will be suffering as they choose to self-isolate from loved ones for fear of transmission.”

Meanwhile, adds the article, written by Stephen Koss, EY Asia-Pacific Workforce Advisory Leader, “those now working remotely face the mental stress of isolation and the physical challenges of new workspaces – kitchen tables, bedrooms and garages – that are far from fit for purpose. Staff may also be juggling business commitments with increased childcare and home-schooling responsibilities – and worries about older, immunocompromised or absent friends and family members.”

For both groups, he advises, supporting wellbeing effectively requires a holistic approach that addresses mental health and engagement with the psychosocial considerations in this new working environment. How best to do this?

***Protect both mental and physical health:*** Koss thinks that, beyond all your physical protection measures, make sure employees know where to find information, guidance and support for mental health. “Maintain open channels of communication to hear how employees are feeling and, importantly, listen and respond. Consider establishing a hotline or central contact point for employees – and develop in-house channels and hubs to respond promptly to employee questions and concerns.”

Koss urges employers not to rely on people to self-report. “Two-way conversations are essential to building trust. It’s vital to monitor mental wellbeing with structured regular opportunities for employees to ‘check-in’ with managers and colleagues – and encourage peer support. Share techniques to stay calm, present and focused. Reinforce the importance of being physically active to reduce stress and mindfulness for mental clarity.

Make everyone aware that significant changes in a team member's personality or work product may be signs that a person is struggling. If possible, leverage analytics to identify vulnerable “hot spots.” Put mechanisms in place to ensure at-risk employees are reached out to immediately with empathy and concern – not just with practical solutions.

***Keep your staff connected and feeling supported in isolation:*** With employees feeling overwhelmed and anxious, ask leaders to make themselves available to staff to talk about their fears, answer questions and reassure them about work and personal issues. “When people are working remotely, it’s more important than ever to routinely check in, not only about work, but also to see how people are doing.” Ask direct questions: “How are you managing? What would you most like support with at the moment?”

***Foster resilience and performance.*** The sudden shift to working from home has the potential to de-rail performance. Koss advises making sure employees have sufficient infrastructure, flexibility and support to do their job to the best of their ability under the current circumstances. “In these extraordinary times, we need acknowledge different work patterns, particularly around remote working and virtual teaming. Empower your middle management – a highly influential cohort – to drive new ways of working.”

Consider opportunities to upskill employees and cross skill teams. Provide access to tools and online learning platforms to empower employees, increase organizational capability, workforce flexibility and resilience. Notes Koss, “employee engagement will be improved where they can form part of organizational solution.”

For more, have a look at [Protect employee wellbeing during COVID-19 | EY Canada](#).

## **Promoting Mental Wellness in the Workplace**

A recent post on the McKinsey & Company webpage said that nine out of ten employers surveyed by McKinsey reported that the COVID-19 pandemic has negatively affected the behavioral health of their workforce.

According to the post, “almost one billion people worldwide have a mental or substance-use disorder, and the number has only grown as a result of the pandemic. Lost productivity as a result of two of the most common mental disorders, anxiety and depression, costs the global economy \$1 trillion each year. Forty-one percent of American adults – including 75 percent of Gen Z (18- to 24-year-olds) – surveyed by the US Centers for Disease Control in late June 2020 reported struggling with mental health issues stemming from the pandemic.”

Although mental and substance-use challenges had a negative impact on companies before COVID-19, McKinsey analyses suggest that their prevalence grew at least 50 percent during the 12 months following the pandemic’s onset, and is resulting in more than \$100 billion in incremental health spending in the United States alone. Most of 1,000 employers surveyed by McKinsey were aware of existing needs, and about two-thirds indicated they were taking action.

But are these actions meeting employee needs? According to the McKinsey survey, “while 71 percent of surveyed employers report that frontline-employee mental health is supported well or very well, 27 percent of frontline employees rate the offerings as only good or very good. Moreover, 67 percent of employees with a mental illness said finding access to care was very difficult, and 68 percent of employees reported a continuing stigma attached to mental and substance-use disorders in the workplace.”

The post cited the following ways that employers can create a better mental health future for their employees:

***Make mental wellness a priority.*** Lead by example and demonstrate commitment from the top of the organization, appoint a senior leader who is accountable for employee well-being, and cultivate open lines of communication with employees.

***Enhance the available mental health support.*** Offer mental health benefits that are on par with physical health benefits, and ensure easy access to resources for mental and substance-use disorders, including tailoring resources to the needs of particular employee groups. Focus on employee self-care, skill building, and resilience.

***Communicate the available mental health support.*** Share information via multiple channels, and tailor communications for different levels of employee need. Have leadership promote mental health resources at regular intervals.

***Cultivate an inclusive work culture.*** Implement campaigns to reduce the stigma preventing employees from seeking help. Ensure that the workplace environment supports employee well-being as a skill that can be learned, and train leaders to understand signs of distress. Foster workplace community and connectivity.

***Measure and meet the existing need.*** Use routine surveys to monitor employee mental health and well-being, and learn whether the offered benefits meet employee needs. Connect well-

being metrics with performance targets, demonstrating the organization's commitment to responsibility and accountability.

For more, read the post at [Promoting mental wellness in the workplace | McKinsey & Company](#).

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## Twenty-First Century Corporate Reporting: Effective Use of Technology and the Internet

How and why do corporations use the internet for reporting to their stakeholders? How and why has corporate reporting extended beyond financial reporting to include environmental, social, and governance (ESG) reporting and even integrated reporting. The major drivers of modern reporting have changed, to include data driven decision making, big data, and advanced analytics, as well as the use of electronic representations of data with tools such as XBRL.

Here we explore the various vehicles for using the internet, including social media and blogs as well as corporate websites and the websites of regulators. And we delve into the impact of portable devices, like smartphones and tablets.

Corporate reporting on the internet is changing fast because of changes in technology and stakeholder expectations. Companies are having a hard time keeping up. This book offers a roadmap to follow—a roadmap to start on now. Most importantly, the book lays out a strong case for integrated reporting and shows how reporting on the internet is ideally suited to the creation of integrated reports.

This book is of interest to executives in charge of the reporting function for their companies, students of accounting and management, and to serious investors and others with a strong interest in corporate reporting and the direction in which it is headed.



Gerald Trites is a CPA with a history of writing and publishing and a unique background. He was a partner in KPMG for seventeen years, and a tenured professor of accounting and information systems for ten. He also served for twelve years as director of XBRL Canada. He has published twelve books and numerous articles and papers. He worked as a research associate for the Canadian Institute of Chartered Accountants and served as chair of the Auditing Standards Board. He currently serves as editor-in-chief of ThinkTWENTY20 magazine, a publication he started in 2019 with the objective of publishing well-researched articles of substance.

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