

Mental Health Policy Framework for Small to Medium-Sized Practitioners

In this resource, we provide a general framework that small to medium-sized practitioners (SMPs) can follow when determining how to implement mental health initiatives at their firm. The framework consists of a list of general best practices that have been used by various small to medium-sized firms throughout Canada to promote mental health and wellness for all their employees. In addition, we provide links to various resources provided by CPA Canada, CPA provincial bodies and other government organizations SMPs can access for further information on specific areas of mental wellness.

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Introduction

In many organizations, employees are constantly feeling pressure points from both internal (personal, firm) and external levels (COVID-19, client), and this pressure is creating a significant impact to their overall physical and mental health. Organizations that do not monitor and encourage the wellbeing of their employees are finding that these employees are suffering burnout, mental fatigue / exhaustion, physical illness or other medical problems. This situation has resulted in organizations losing valuable employees and experiencing an overall decline in employee productivity.

For the majority of SMPs, the idea of monitoring the mental health and wellbeing of their employees (and themselves) has become high-priority. In the past, the issue of employee mental health may not have been top of mind for SMPs, as it was generally accepted that employees dealt with this issue on their own.

However, SMPs are recognizing that monitoring the mental health and wellness of their employees can provide substantial benefits to both the firm and its employees. If you are part of a small to medium-sized practice, you know that your staff is a valuable asset; thus, it is important that you implement policies and initiatives to care for your workforce as well as yourself.

While SMPs do not need to be classified as experts in mental health, it is important to be able to recognize signs that issues may be arising in your staff and yourself and to direct your employees to seek the help they need. This resource is intended to help provide a general framework for SMPs, to help you implement mental health initiatives at your firm; it also offers various resource links that offer further information on specific areas.

1) List of Sample Policies and Initiatives That SMPs Can Incorporate in a Mental Health Policy Framework

Below is a list of suggestions that SMPs can adopt when implementing a mental health policy framework in their organization. While your firm may not have an infinite number of resources available to implement all possible mental health policies and initiatives, it is important that you are able to recognize which policies and initiatives you can easily integrate.

If possible, discuss these policies with your human resources (HR) department to ensure that they are appropriate for your firm.

Disclaimer

The policies below are presented as non-authoritative guidance and are intended as recommendations for you to consider implementing as part of your firm's mental health policy framework.

- a) **Tone from the top.** There should be a firm-wide discussion on the importance of mental health, removing the stigma associated with mental health and encouraging the workplace to have a safe space for people to be able to talk about mental health. It is important to have someone at the executive level (practitioner / partner / principal) talk with staff about the importance of mental health and be able to normalize this discussion at the firm.

- b) Create a safe space for employees to talk about mental health.** Once employees feel that they can have an open discussion about mental health, the organization will be in a better position to identify any mental health concerns and support their employees when needed.

When creating this platform / safe space, it is important that certain ground rules be followed. These rules help establish a framework that

- a. allows employees to establish trust, so that they can talk with each other about mental health issues
- b. ensures that employees do not feel they will face consequences for discussing their issues and concerns

The following are examples of ground rules that can be used to create this safe space:

Confidentiality. Personal information shared in the group should not be disclosed to anyone outside the group.

Disclosure. Employees can learn a lot from each other by sharing experiences, but no one should feel obliged to disclose anything they want to keep private.

Inclusion. Employees all need to help each other participate. In particular, people who are more confident about speaking up should remember to hold back at times, to give others a chance.

Participation. The more one participates, the more they will get out of this group and these conversations. But this should not feel like an unwelcome pressure, and it is fine to not talk and choose to listen or read instead.

Respect. There are many differences between us, including how knowledgeable we are, our opinions and our life experiences. Whatever differences or disagreements arise, everyone needs to treat each other respectfully as individuals. This is especially important across differences in gender, ethnic group, backgrounds and identities.

Vulnerability. It is hard to talk about personal or work-related issues, and it takes a degree of courage to do so. Everyone should remember to try their best to allow themselves to be vulnerable and to respect other people's vulnerabilities, as well.

- c) Implementing an employee assistance program and/or health benefits plan.** It is important that SMPs aim to provide a health benefits plan that supports mental health. This could come in the form of health benefits that include paramedical coverage to cover therapy, and/or through your firm's EAP (Employee Assistance Program).

An EAP is a workplace wellness program that offers confidential and short-term support to assist with a variety of financial, legal, physical and mental health issues. The program would provide a limited number of easy-to-access therapy or other service sessions that are free to the employee and strive to boost their productivity by addressing their personal stressors.

It benefits the employee if you clearly outline what is included in the benefits plan and what expenses they would have to incur (e.g., counselling sessions, etc.). It is important that the SMP conduct a proper assessment of where employees need help, as this will decide what type of coverage should be included in the plan. The costs of an EAP to the employer are typically nominal compared to a health benefits plan. Employers can choose to either pay as they go or pay a monthly recurring fee to the benefits provider. If your firm does not have a benefits provider, you can source an EAP from other vendors.

- d) Policies in place for employee leaves: vacation, sick, personal, bereavement, short- and long-term.** Your firm needs to have policies in place that make it clear to employees when they can take time off, and you can ensure that employees take this time off by providing vacation planning help and coverage. If possible, the HR department should be involved in providing clear policies on all leaves, to make sure that all known employment laws have been satisfied.
- e) Firm-wide healthy initiatives.** As part of ensuring that employees engage in a healthy, active lifestyle, encourage employees to take part in initiatives that promote a healthy working environment. Healthy initiatives such as exercise goals, meditation sessions and other physical activities can help promote an active lifestyle for employees. These initiatives can also help to promote group camaraderie among the team.
- f) Policy to encourage employees to disconnect from their electronic devices during off hours.** It is important to recognize that your employees need to be able to have time away from the office and not constantly thinking about work. Having policies in place to encourage a proper work-life balance for all employees will help to promote a healthy lifestyle.
- g) Training for managers to talk to their employees about mental health.** For many managers, the topic of mental health may not be natural for them to discuss with their employees. Your firm needs to ensure that managers have proper training in place so they can identify signs of mental distress and discuss mental health issues with their employees.

Notes for Sole Practitioners

Many sole practitioners may feel that they do not have enough resources to implement all the above suggested mental health initiatives in their firm. Sole practitioners may feel helpless in addressing the issue of mental health because they may not have enough internal or external support and do not know where to start.

If you are a sole practitioner, it is important to reach out to your local SMP / CPA community to discuss what your fellow practitioners (and small businesses) have done to implement mental health initiatives at their firms. For instance, many local chamber of commerce organizations offer the opportunity for practitioners and other small businesses to invest in group health benefit plans that also offer mental health services and resources.

As noted above, you will need to analyze these plans to ensure they meet their needs and are within cost constraints. You can also direct your employees to many of the mental health resources offered by your local CPA organization to get more information on a particular topic (you will find examples of mental health resources on the next pages).

2) Links to Mental Health Resources (Canada)

The following list includes links to various mental health resources and initiatives that are available for everyone to access. For your reference, a brief background description accompanies all external links.

Disclaimer: Certain links noted below take you to other websites, resources or tools maintained by third parties over whom CPA Canada has no control. CPA Canada provides these links only as a convenience and is not responsible for the contents of any linked website. CPA Canada makes no representations or warranties regarding, and does not endorse, any linked website, the contents thereof, the information appearing thereon or any of the products or services described thereon. Links do not imply that CPA Canada sponsors, endorses, or is affiliated or associated with the entity that owns or is responsible for any linked website. If you decide to visit any linked websites, you will do so at your own risk. CPA Canada bears no responsibility whatsoever for the content, accuracy or security of any websites that are linked (by way of hyperlink or otherwise).

CPA Canada – On-Demand Offerings

Session title	Type
<i><u>A candid discussion about mental health with KPMG’s chief mental health officer (Denis Trottier)</u></i>	Video
<i><u>Coping with stress during COVID-19</u></i>	Webinar
<i><u>Wellness in a time of crisis</u></i>	Webinar
<i><u>Carve out a productive daily schedule at home during COVID-19</u></i>	Article
<i><u>6 apps to help you socialize while social distancing</u></i>	Article
<i><u>Ten healthy habits to have during COVID-19 (English description, webinar in French only)</u></i> <i><u>Dix saines habitudes à maintenir durant la pandémie</u></i>	Webinar

The following member assistance programs (MAPs) are available to CPAs working in various jurisdictions throughout Canada. For MAPs not listed in your jurisdiction, please contact your local provincial body to enquire about services available to you in your region (French language links have been provided where available).

Alberta / Saskatchewan

CPA Assist

URL: <https://cpa-assist.ca/>

CPA Assist provides confidential counselling services and 24/7 crisis support. The program is designed to help Chartered Professional Accountants (CPAs), candidates and their immediate families address mental illness, addictive behaviours, substance abuse and other personal or professional issues to ensure their well-being and the well-being of their communities, the accounting profession and the public.

In addition to providing counselling services, they offer a wide range of free [resources](https://cpa-assist.ca/resources) [(<https://cpa-assist.ca/resources>), comprising webinars, articles, etc.] that focus on a wide range of areas including: COVID-19, addiction, domestic violence and abuse, grief and

bereavement, mental health, suicide and suicide prevention, wellness, balance and Stress, and other wellness topics.

British Columbia / Yukon

[Counselling Services and Access to Lifeworks by Morneau Shepell Member Assistance Program](#)

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

All CPABC members, candidates and students, along with their immediate family members, may access **confidential** help through Lifeworks by Morneau Shepell's Member Assistance Program (MAP). These services are paid for by CPABC. The MAP is designed to help individuals access resources in areas such as (but not limited to): dealing with stress, anxiety and depression, resolving personal and emotional difficulties, addressing marital and relationship issues, coping with isolation and loneliness, addressing alcohol and drug misuse, and accessing crisis and trauma support.

Ontario

[Access to Lifeworks by Morneau Shepell Member and Student Assistance Program](#)

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

All CPA Ontario members and students may access **confidential** help through Lifeworks by Morneau Shepell's Member Assistance Program (MAP). The MAP is designed to help provide confidential support for any work, health or life concerns in a way that is accessible, easy-to-use and available 24/7.

Québec

[CPA Québec – CPA Assistance Program / Ordre des CPA du Québec – Programme d'aide aux CPA](#)

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

URL: <https://cpaquebec.ca/fr/membres-cpa/programme-daide-aux-cpa>

For the Ordre, the health and well-being of CPAs working in Québec is a priority. The CPA Assistance Program (CPAAP) is created to provide members of CPA Québec with easy access to professional resources that can offer support to address issues that affect their mental health and wellness. Services included in the program cover areas such as counselling, financial assistance, legal assistance, and health and wellness information.

The following list includes government websites that allow anyone to access resources focusing on mental health and wellness initiatives.

[Mental Health Commission of Canada / Commission de la santé mentale du Canada](#)

URL: <https://www.mentalhealthcommission.ca/English>

URL: <https://www.mentalhealthcommission.ca/Francais>

The Mental Health Commission of Canada (MHCC) leads the development and dissemination of innovative programs and tools to support the mental health and wellness of Canadians. Through its unique mandate from the Government of Canada, the MHCC supports federal, provincial and territorial governments and organizations in implementing sound public policy. The MHCC provides a host of resources, tools and programs designed to increase mental health literacy and improve the mental health and well-being of all people living in Canada. Find those resources here:

[MHCC English Resources \(https://www.mentalhealthcommission.ca/English/resources\)](https://www.mentalhealthcommission.ca/English/resources)

[MHCC French Resources \(https://www.mentalhealthcommission.ca/Francais/ressources\)](https://www.mentalhealthcommission.ca/Francais/ressources)

[Government of Canada / Gouvernement du Canada](#)

URL: <https://www.canada.ca/en/public-health/topics/mental-health-wellness.html>

URL: <https://www.canada.ca/fr/sante-publique/sujets/sante-mentale-et-bien-etre.html>

The federal government has provided this list of various resources that Canadians can access to get further information about mental health, mental illness and related services in Canada.

[Bridge the gApp](#)

URL: <https://www.bridgethegapp.ca>

Bridge the gApp is an online resource designed to support mental wellness for adults and youth. It is an initiative supported by the Government of Newfoundland and Labrador that offers self-help resources and links to local services and allows users to share their own personal stories about mental health.