

Discover how our best practices emerged

Sun Life





Developing and implementing a successful workplace mental health strategy

Every organization is unique and requires a tailored approach to workplace mental health that addresses their specific needs. Regardless of industry or company size, employee well-being is essential to creating a healthy workplace environment.

There are many effective actions that organizations can take to promote mental health in the workplace. We recommend you read this success story of an employer who developed and improved their mental health strategy. You can learn from their experience and apply similar actions to your own workplaces.



Essential components of a healthy organization

A mentally healthy workforce is key to a company's success. In this case study, you'll learn more tactics for success to improve workplace mental health.

Here are 3 critical components of organizational success:

- **Leadership commitment** to changing workplace culture
- **Organizational assessment** to better understand your needs and risks.
- **Tailored mental health strategy**

The case study below showcases what's possible. It highlights Sun Life's commitment to bringing our tested best practices to you in supporting the health of your employees.

Discover how our best practices emerged



Sun Life empowers employees to live healthier lives

Sun Life is Canada’s largest group insurance providers – and one of the country’s largest employers. As such, we’ve seen the benefits of supporting employee health first-hand.

And we’re committed to leading by example. It’s a continuous process of evaluating needs, learning and testing, and putting sustainable improvements in place. That’s how our best practices emerge. Sun Life is committed to bringing these best practices to you in supporting the health of your employees.



The opportunity

Each year we complete an Integrated Health Insights (IHI) report with the help of our Integrated Health Solutions team. This gives a holistic view of employee well-being. We learn where our strengths are and where we have opportunities to improve.

From a mental health perspective, we have achieved many successes in recent years. You can learn about these in our previous [Bright Paper report](#). Our most recent opportunities focus on access to care and empowering employees to take action to improve their own mental health. These shaped our activities in 2021.



The approach

To lead by example and fulfill our purpose of helping our employees live healthier lives we are always looking to the future. Our focus is on developing new and innovative ways to best support employee health. That’s why in 2021, we created a dedicated workplace mental wellness team. The team’s mandate is to oversee current initiatives and to test and learn new solutions. This new team will help us meet the evolving needs of our own employees. It will also ensure we can continue to bring you best practices based on our own experiences.

The team takes a data-driven approach across the business:

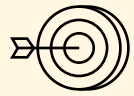
- Employee engagement with all our mental health programs is measured and uploaded to a mental health dashboard. Our Canadian Executive Team and Senior Leaders review this on a regular basis.
- Our regular surveys measure employee perceptions about their mental health. We ask about the impacts of many different types of stress. This includes internal stressors (at work) and external stressors (such as COVID-19, social justice issues, and climate change).
 - Recent surveys revealed that many employees were struggling with the time needed to fulfill tasks outside of work. This had intensified during the pandemic. They were seeking greater work flexibility to be able to cope with these demands.



“Attitudes towards mental health issues are changing, with less stigma and a greater desire to take action. When people are engaged in their own care, we can improve outcomes.

We’ve encouraged this engagement by making it easier to get care, integrating access to resources and solutions that support easy access to wholistic health care both mental and physical. Services like Employee Assistance Program (EAP) support and Virtual Care Solutions for mental health are now available through a single portal.”

Sun Life executive



The actions

Based on the insights from these measures we undertook several actions in 2021 to improve employee mental health supports. Important themes were:

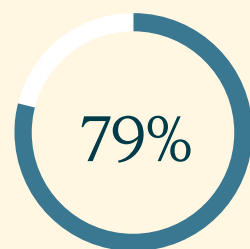
- engaging and empowering employees to take steps to improve their mental health by increasing awareness and
- access to supports available to them through the workplace and their plan.
- **Mental Health Coach pilot.** We extended our pilot for the Mental Health Coach, provided by Kii Health (formerly CloudMD). This program gives employees the opportunity to engage with a licensed health-care practitioner (the "Coach"). The Coach helps identify and guide employees to the right mental health resources for them. With the support of a Coach and a greater awareness of the resources available, employees are empowered to take action to improve their mental health and remain healthy at work.

The results to date are very encouraging. Across all Sun Life Staff Plan members, 15% created an account with the Mental Health Coach after receiving a communication about it. More than half of these plan members (57%) completed their initial assessment and booked an appointment with a Coach.

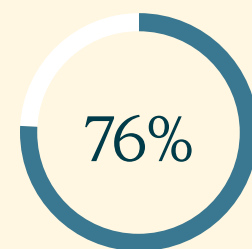
And the program is engaging at-risk plan members. More than 60% of plan members who booked a Coach appointment had a high overall risk level.¹

The service is also prompting plan members to use their psychological benefits. For those who engaged with a Coach, 25% used their psychological benefits. This compared to just 15% for those who didn't use a Coach. Importantly, many plan members were new claimants. More than half of plan members using the program hadn't made psychological benefits claim before.²

The coaching and subsequent actions by plan members led to improved mental health:³



- For anxiety, **79%** of plan members who were reassessed showed improvement



- For depression, **76%** of plan members who were reassessed showed improvement

- **Improve access by integrating services.** Mental health supports are of little use if awareness of them is low, and access is difficult. This past year we took action to improve both access and awareness.

We launched our enhanced Employee and Family Assistance program (EFAP) through Lumino Health Virtual Care, powered by Dialogue. The EFAP provides mental health resources, legal and financial advice, career counselling and help for families and relationships.

By having a single wellness platform, all supports are now clearly visible to employees. Whatever issues emerge, they are now empowered with a clear place to start for help. As a platform with many entry points, it helps remove stigma as a barrier to accessing mental health care.

- **Increase manager training.** Every people manager at Sun Life has a critical role to play in creating a psychologically safe work environment. For newly hired or promoted people managers, we made mental wellness training a part of the onboarding process. And for current managers, we made this training mandatory.

- **Vacation and sabbaticals.** We're also encouraging employees to use their vacation days throughout the year. This provides an important break from daily routines to invest in personal interests or self-care.

We also offer and encourage use of our sabbatical program. This provides employees with an extra week of paid time off, to which they can add a self-funded leave. Our business leaders lead by example. Several senior executives having already taken such a leave themselves.

- **Communicate regularly.** We created robust annual communication plan to increase awareness of mental health issues and the supports available. We use multiple channels. These include weekly wellness posts, webinars, town hall meetings, and communication through our secure plan member site.

Our business leaders play a very important role in creating a culture of well-being. Many have begun sharing their own personal mental health stories with the broader employee base. Sharing like this by leaders can help reduce stigma, shattering stereotypes around who is affected by mental health difficulties.

It can go along way to help create a safe space for employees to seek the support they may need in the workplace, empowering them to take action when previously they may have felt uncomfortable doing so.

¹ Risk level based on Kii Health and Sun Life risk analysis metrics

² Results based on the Sun Life Staff Plan Mental Health Coach pilot: May 2021-June, 2022

³ ibid



The results

We continue to show leadership in creating a psychologically healthy and safe workplace. And in 2021, we were recognized for this work, receiving a Platinum Certification by Excellence Canada.

However, the true reward for improving supports is improving the mental health of our employees. We've made strides to enhance access to mental health care. And we've helped empower employees to take steps to support their mental health. Metrics like these speak to the progress we've made:

- A 25% increase in the use of mental health coverage in 2021 compared to 2020. This includes a 2-times higher percentage of new psychology benefit claimants (employees using their psychology benefits for the first time), for those engaging with the Mental Health Coach.
- In 2021, 1 in 8 plan member consults through Lumino Health Virtual Care, powered by Dialogue, were for mental health support. This has proven itself an important new access point to care for those experiencing mental health concerns.
- 95%+ of managers completed mental health training. This ensures that all people managers have basic training to create and maintain a psychologically safe work environment. It also helps ensure they have the tools and confidence to identify and support employees with mental health concerns.
- Our disability incidence remained below the benchmark for our industry through 2021

The initiatives we've undertaken in 2021 are setting a critical foundation for longer-term improvements in the mental health of our employees. We look forward to sharing details of our progress.

Our goal is to be a leader in workplace mental health and to lead by example with our own employees. To do this, we'll continue to listen, learn, and innovate. And we'll continue to make these best practices available to you.





Sun Life innovations in mental health support

Our focus is on innovating to shape the benefits market, developing better ways of supporting our Clients.

Engaging at risk employees with Mental Health Coach, provided by Kii Health (formerly CloudMD)

A Sun Life study of working Canadians found that more than half of those experiencing a mental health issue weren't using their workplace benefits for support.⁴ Cost, access to care, and stigma are key barriers they cited to seeking support.⁵

Sun Life designed Mental Health Coach to help overcome these challenges. It engages employees who are at risk, but still at work. It plays a critical role in connecting them to the resources and treatment they need. It supports them to take action and provides ongoing follow-up.

The Coach helps employees connect to the mental health care they need in three steps:

- 1. Do a mental health check in.** Your employees can complete an online mental health assessment. Then, book an appointment with a Mental Health Coach. All Coaches are registered licensed health-care practitioners, qualified to interpret results, and identify appropriate care.
- 2. Meet with their Mental Health Coach by phone.** Their Coach will talk to them about their assessment results. They'll match their needs to what they have in their benefits plan and other available resources.
- 3. Start their mental health journey.** Their Coach will work with them to create a personalized action plan. They'll also provide continuing support and follow up to help ensure they are progressing toward symptom reduction and recovery.

Of those that have met with a Mental Health Coach and been re-assessed:

- 94% have experienced a reduction in symptoms,
- have engaged in lifestyle changes that are proven to improve total mood,
- and/or have begun extra mental health treatment.

⁴ The 2019 Sun Life Barometer: <https://www.sunlife.com/en/newsroom/news-releases/announcement/mental-health-conditions-on-the-rise-while-helpful-resources-remain-untouched/123291/>

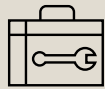
⁵ Ipsos poll conducted between January 21 - 25, 2021: <https://www.sunlife.com/en/newsroom/news-releases/announcement/most-canadians-experiencing-a-mental-health-issue-are-not-getting-help/123513/#:~:text=TORONTO%2C%20March%204%2C%202021%20%2F,with%20a%20mental%20health%20crisis>

Take your next step towards improving workplace mental health.

You don't have to do it alone!

The pandemic has made having a mental health strategy that much more critical. This case study shows how you can make a difference and improve workplace mental health with the right approach.

Get started with our free Mental Health Strategy Toolkit.



[Use the Free tool kit now](#)

It was created based on our:

- years of experience working with Clients to create healthier workplaces
- extensive testing within our own organization to find solutions that work

It's a great resource to help organizations get started, as well as to guide employers already on their journey.



Need more support?

We're here to help.

Connect with your Sun Life Group Benefits representative to discuss which [Organizational Health Solutions](#) may be right for you.



This report provides you with general information only. It doesn't provide you with employment, legal, health, or financial advice. Consult with the appropriate professional advisor to meet your organization's needs.

Life's brighter under the sun

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