

Mental Health and the Accounting Profession

*Accountants' Mental Health Strategies for Ourselves and Our Colleagues
Best Practices for Organizations*

November 28, 2019
Carleton University, Carleton Dominion-Chalmers Centre
Ottawa, ON, Canada

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Mental health in the workplace is a growing area of research and practice. Organisations in many industries are involved in initiatives to increase awareness of mental health and seeking to support their employees.

Hosted on Thursday, November 28th, 2019 and funded by CPA Ontario and presented by the Professional Accounting Research Group (PARG) of the Sprott School of Business at Carleton University, *Mental Health and the Accounting Profession* offered a range of perspectives on the topic and called for an ongoing conversation about mental health in the field of accounting (see Appendix for agenda).

Dr. Dana Brown, Dean of the Sprott School of Business, welcomed attendees of this event, emphasizing the importance of new initiatives focussed on mental health not only in accounting, but in the workplace more broadly. Dr. Brown explained the significance of mental health to the Sprott School of Business – particularly as the faculty moves towards a more inclusive future.

Speakers

*Dr. Merridee Bujaki, FCPA, FCA
Sprott School of Business, Carleton University*

Opening remarks for this event were provided by Dr. Merridee Bujaki, a professor of accounting at the Sprott School of Business. Dr. Bujaki previously served as President of the Canadian Academic Accounting Association and is a co-director of the Centre for Research on Inclusion at Work (CRIW).



Dr. Bujaki set the stage for the discussion of mental health and the accounting profession, providing critical information and statistics about the state of mental health of working accountants. Beginning with a definition of mental health, Dr. Bujaki described the stigma surrounding mental health and barriers that individuals can experience when seeking support.

Dr. Bujaki has been exploring this subject for some time: beginning in 2015, she worked on a project on health and productivity with colleagues from the University of Ottawa. A large percentage of women interviewed for this study discussed health concerns – many of which are directly linked to stress and mental health. From this project, Dr. Bujaki was able to apply for funding from a joint SSHRC-CIHR research program, ‘Healthy and Productive Knowledge Workers’, receiving a Partnership Development Grant (2016-2018) from the federal government to study this important topic.

Based on a pilot study conducted in 2017, Dr. Bujaki observed there are high rates of mental health challenges in the accounting profession. Further, Dr. Bujaki described the associated repercussions – both personal and organizational. These frequently lead accountants to leave their employer or take a leave of absence from their organization.

Dr. Bujaki concluded her presentation by emphasizing the ways in which individuals concerned about their mental health or the mental health of a colleague can and should seek help and support. She provided many resources for supporting one’s self and others including guides for helping a colleague and information on support networks.

For more information:

<https://sprott.carleton.ca/parg/wp-content/uploads/PARGMentalHealthAccountingProfession20191128MBujaki.pdf>

*Denis Trottier, FCPA, FCA
Chief Mental Health Officer, KPMG*



Denis Trottier, KPMG's Chief Mental Health Officer since 2017, retired from KPMG after 31 years working as an accountant (some of which were spent as an Enterprise partner focused on private company clients). In his comments Denis combined his personal experience with mental health challenges with broader implications for his field as a whole. Denis is a Carleton University alumnus and he was awarded the FCPA designation by CPA Ontario. More recently, working extensively with the Royal Ottawa Health Care Group, Denis has been a dedicated and outspoken advocate for mental health.

Denis presented the audience with a moving video in which he and his wife are interviewed about his battle with depression and the stigma that can surround individuals seeking support for their mental health. Denis passionately described various examples of the barriers he faced, the support he received, the repercussions for individuals of a lack of support, and cases in which individuals sought and benefitted from mental health support systems. Denis' message was clear: he is working hard to dismantle stigma and to encourage every organization to increase their awareness and support of mental health.

Denis' video about his experiences can be found here:
<https://www.youtube.com/watch?v=Puw9GqKbAmQ>

Dr. Tim Simboli

Executive Director, Canadian Mental Health Association (CMHA), Ottawa



Dr. Tim Simboli, the Executive Director at the Canadian Mental Health Association's Ottawa Branch for 8 years, presented professional and personal advice regarding mental health, addressing both the individual and organisational levels. Dr. Simboli worked as the Executive Director at Family Services Ottawa (which offers counselling and support services locally) prior to his current position and holds a PhD in Psychology from Carleton University.

Dr. Simboli drew from his experience working in this field to emphasize the value of support for individuals struggling with mental health, and for organizations and individuals to have patience and empathy for others. Dr. Simboli explained the importance of reaching out to a colleague who may be in need, how to check in with one's self and one's own mental health, and how to navigate the nuances and stigma of mental health more broadly.

Dr. Simboli concluded with passionate anecdotes from his personal experience as well as his work experience, providing context and a deeper understanding of the spectrum of mental health and the gravity and consequences of the lack of support in this area.

Caroline Workman
Organizational Health Consultant, Great-West Life (Canada Life)



Caroline has worked closely with large group clients, such as Carleton University, for almost 20 years developing and implementing strategic health, wellness, and disability management programs. A certified Return to Work Consultant, Caroline holds a Bachelor of Health Sciences degree in Human Kinetics from the University of Ottawa.

Employing industry experience and examples, Caroline opened her presentation with an explanation of the importance and urgency of increased support for mental health in the workplace. She further explained that, among professional and management employees, mental health issues represent the most significant

proportion of health issues leading to long-term disability claims. Caroline built on these findings to emphasize the importance of recognizing and supporting mental health in the workplace.

Caroline explained that the benefits of supporting mental health are important for employees – but further, that this support is important for organizations as a whole. She explained that the scarcity of training in industry on this subject has led to a workforce of managers who may want to help support their employees who are facing mental health challenges, but most managers lack the tools and support to do so.

Caroline recommended strategies to create support networks within organizations, and described six steps for employees returning to work after a mental health-related leave:

- (1) maintaining contact with the employee on leave;
- (2) addressing work-related issues before the return;
- (3) continued supervisor involvement and support;
- (4) a check-in regarding the job itself and potential flexibility;
- (5) employee personal preparation; and
- (6) creating a return-to-work plan that involves both the employee and the supervisor.

For more information:

<https://sprott.carleton.ca/parg/wp-content/uploads/PARGMentalHealthAccountingProfession20191128CWorkman.pdf>

Concluding Thoughts: New Initiatives for Sprott



Funded by CPA Ontario, this morning event was held in Woodside Hall in the Carleton Dominion-Chalmers Centre (CDCC) located in Centretown, Ottawa. The CDCC is Carleton University's Arts, Performance and Learning Centre and its aim is to provide a space that can help bridge the gap between research and practice by connecting with industry.

The CDCC is committed to providing an inclusive space – a commitment that is in tandem with the Sprott School of Business' recent initiatives aimed at promoting inclusivity in the school itself as well as in research conducted at the School.

In a recent shift towards producing inclusive research, an important research centre at Sprott changed its name from the *Centre for Research and Education on Women and Work* (CREWW) to the *Centre for Research on Inclusion at Work* (CRIW) – reflecting the significance of moving towards a more inclusive future, including greater inclusivity for those experiencing mental health challenges.



Links could also be found at: <http://sprott.carleton.ca/parg/seminars/>

ABOUT THE AUTHOR

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APPENDIX – AGENDA

Mental Health and the Accounting Profession

Accountants' Mental Health Strategies for Ourselves and Our Colleagues Best Practices for Organizations

What would you do if you couldn't face going to work in the morning? What can you do to help a colleague who is experiencing a difficult time? How can your organization foster a healthy and supportive workplace?

We are hearing a lot about mental health in the media recently and more and more organizations are investing in initiatives to assist employees in optimizing their mental health. However, stigma still accompanies many mental health conditions. In turn, stigma discourages many people from disclosing their challenges, especially at work.

This session focuses on mental health in the accounting profession and seeks to foster a greater understanding of mental health among accountants, and to share strategies to support ourselves, our colleagues, and our clients, particularly in the workplace.

- 8:30 a.m. Gather. Light breakfast available
- 9:00 a.m. Welcome – **Dana Brown**, PhD, Dean, Sprott School of Business, Carleton University
- 9:10 a.m. Introductions and Introductory Remarks – **Merridee Bujaki**, PhD, FCPA, FCA, Professor of Accounting, Sprott School of Business, Carleton University
- 9:30 a.m. **Denis Trottier**, FCPA, FCA, Chief Mental Health Officer, KPMG
- 10:00 a.m. **Tim Simboli**, PhD, Executive Director, Canadian Mental Health Association Ottawa
- 10:30 a.m. Mental health and nutrition break
- 10:45 a.m. **Caroline Workman**, BSc., Certified Return to Work Coordinator (CRTWC), Organizational Health Consultant, Great-West Life
- 11:15 a.m. Opportunity for questions
- 11:45 a.m. Closing Remarks – **Merridee Bujaki**

Questions? Contact Professor Merridee Bujaki, PhD, FCPA, FCA merridee.bujaki@carleton.ca
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