





Mental Health and the Accounting Profession

Thursday November 28, 2019 Merridee Bujaki, PhD, FCPA, FCA



PARG



PARG
Professional Accounting
Research Group



http://sprott.carleton.ca/parg/

Funding by CPA Ontario





Agenda

- Welcome Dr. Dana Brown, Dean, Sprott School of Business
- Opening Remarks Professor Merridee Bujaki, FCPA, FCA
- An Accountant's Perspective Denis Trottier, FCPA, FCA Chief Mental Health Officer, KPMG
- Strategies for Ourselves and our Colleagues Dr. Tim Simboli
 Executive Director, Canadian Mental Health Association, Ottawa
- Mental health and nutrition break
- Best Practices for Organizations Caroline Workman
 Certified Return to Work Coordinator, Organizational Health Consultant, Great-West Life
- Opportunity for Questions
- Closing Remarks and Resources





Mental Health - Definition

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"

World Health Organization. Promoting mental health: concepts, emerging evidence, practice (Summary Report) Geneva: World Health Organization; 2004.





Background

- We all have mental health everyday
 - How is your mental health today?
 - Are you 'Not myself today'?
 - Are you green, yellow or red today?





 We have a list of resources available later for anyone who may need them.





A few statistics

- In any given year, 1 in 5 people in Canada will personally experience a mental health problem or illness; 500,000 each week
- "1 in 3 workplace disability claims are related to mental health problems or illnesses; 70% of disability costs are attributed to mental health problems or illnesses"
- "The total cost from mental health problems to the Canadian economy exceeds \$51 billion annually"
- "In 2011, mental health problems and illnesses among working adults in Canada cost employers more than \$6 billion in lost productivity from absenteeism, presenteeism and turnover"

Mental Health Commission of Canada https://www.mentalhealthcommission.ca/English/what-we-do/workplace





Benefits of a Mentally Healthy Workplace

- Improved employee performance
- Improved safety
- Improved employee well-being
- Improved recruitment and retention
- Reduced absenteeism and turnover
- Decreased cost of employee benefits and disability claims
 - Mental Health Commission of Canada





My Academic Interest in Mental Health

- In 2015 I began working on a research project on health and productivity among women academics with two University of Ottawa colleagues, Drs. Ivy Bourgeault and Stephanie Gaudet
- A large percentage of the women we interviewed talked about health concerns, many of which have clear links to stress
- This early research led us to apply for funding for a Partnership Development Grant (2016-2018) under a joint SSHRC-CIHR research program, 'Healthy and Productive Knowledge Workers'
 - How do you work when your job is to think, and your thinking is adversely impacted by your mental health?





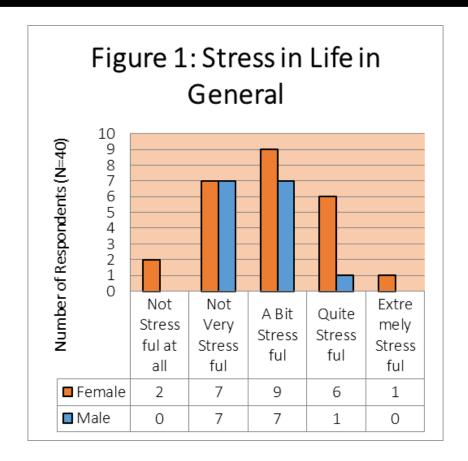
Mental Health in the Accounting Profession

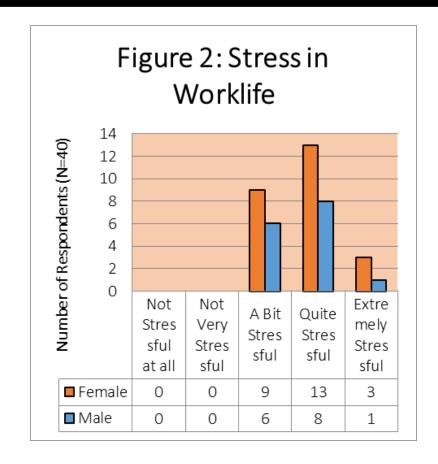
- Review of the literature (academic and professional)
- Small sample online survey of 40 professional accountants
- In-depth interviews with 5 accountants and 4 stakeholder representatives
- Served as the catalyst for a for a five year Partnership Grant (2018 – 2022) to examine mental health among Professional Knowledge Workers





Preliminary Findings



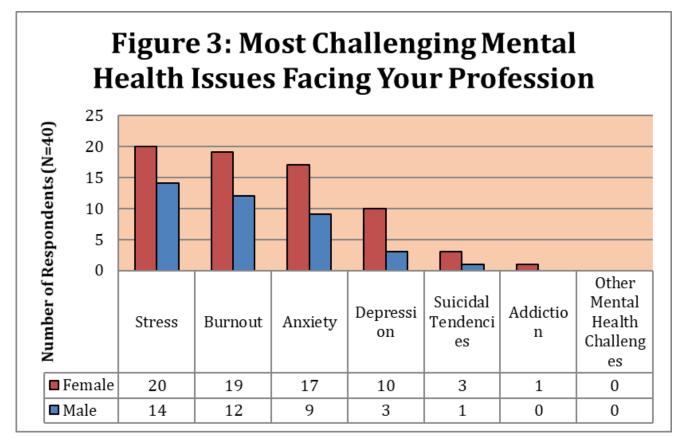


Work related stress is more significant for accountants than stress related to personal or family life Women generally report more stress – both in general and at work





Key Mental Health Concerns in Accounting



85% of respondents identified stress as one of the most challenging mental health issues facing the accounting profession, followed by 78% and 65% mentioning burnout and anxiety, respectively





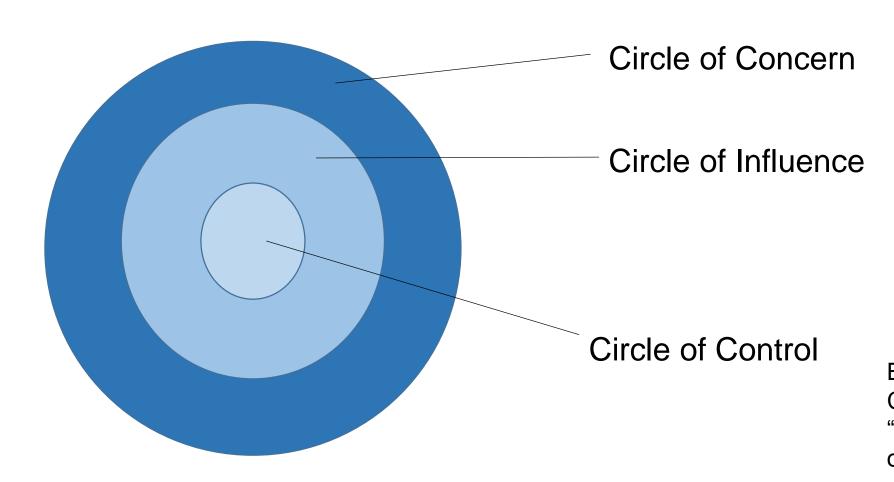
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- 95% of respondents to the preliminary survey attributed mental health issues to work circumstances, particularly work overload
- Survey respondents identified concerns about taking advantage of available mental health programs
 - Stigma in terms of potential impact on future career
 - Programs not able to address root causes of mental health issues
- Many accountants decide to leave their employer and look for other job opportunities hoping for greater quality of work and life balance; less likely to take a leave of absence for mental health reasons
 - A number reported an absence of formal return to work programs





Tools for Resilience



Based on Dr. Stephen Covey's (1989) book "The Seven Habits of Highly Effective People"





Next Steps

- It is very important to continue the conversation we've had this morning and seek out relevant resources – before they are needed
- Variety of ways
 - With yourself Plan for Resilience
 - With your colleagues Supporting a Colleague
 - With your organization Workplace Strategies for Mental Health
 - With researchers
 - Health Professional Knowledge Workers







Plan for Resilience

Workplace Edition

For Leaders, Employees and Self-Employed

https://www.workplacestrategiesformentalhealth.com/employee-resources/plan-for-resilience

RECOGNIZE

You may be the first person to recognize that someone is in distress or to notice a change in their typical behaviour.

"I've noticed you seem distracted and upset lately – I'm concerned. Are you okay?"

- Trust your instincts.
- It's okay to ask and express concern.
- Be specific about the behaviour that worries you.

See reverse for possible indicators of stress, overwhelm and distress.

RESPOND



Talk with the person. Once you have recognized there may be a problem, or if others have expressed significant concern about the person, it is important to respond and let the person know you are concerned.

- Acknowledge: Express concern and be specific about the behaviour that concerns you.
- · Listen: Give your full attention and keep an open mind.
- Reassure: Affirm their thoughts, feelings and experience in a sensitive and compassionate manner.

"It sounds like you're feeling overwhelmed. Can I connect you with a resource for help?"

REFER



Encourage the person to get help and make a referral to one of the services on the back of this document. Ask if they are already connected to support.

- Provide information about resources
- Encourage help-seeking
- Offer to help your colleague connect with resources

The person may say no to a referral or may not follow up with resources.

We must respect their decision, except in the case of emergencies.

Remind them that your door is always open if they reconsider or need additional help.

"If you'd like, we can call and book the appointment while you're here with me."

REFLECT



After the conversation ends, it is important to support yourself and practice self-care. Seek personal support if needed, 24/7 from the Employee and Family Assistance Program provider, Family Services Ottawa at 613-725-5676.

* For Managers/Supervisors/Academic Leaders: If you have observed concerning changes in behaviour in the individuals you manage/supervise, you have a legal duty to inquire. Reach out and say something. If you need support when preparing for this conversation, contact Human Resources for support in managing workplace-related health issues.

Supporting a Colleague: A Step-By-Step Guide

Is your colleague stressed or distressed?

You have noticed changes in your colleague's behaviour. Do you believe they are stressed or distressed?

Possible Indicators of Stress/Overwhelm

- Missed deadlines
- Reduced productivity
- · Reduced quality of work
- · Absent or late more frequently
- Relationship issues or conflicts with colleagues
- Withdrawal or reduced participation
- · Anxiety, fearfulness, or loss of confidence

Possible Indicators of Distress

- Significant low mood with feelings of extreme worry/anxiety, sadness or pain
- · Withdrawing from colleagues, family or friends
- Prolonged irritability and/or unpredictable outburst of anger
- Expresses hopelessness or references suicide, selfharm or harm to others
- Unusual disinterest in or disregard for work with marked changes in concentration

Use the 4 Rs Approach:

- Recognize
- Respond
- ReferReflect
- Restrictes

See reverse.

If YES, determine if the situation is URGENT or NON-URGENT

It is **URGENT** if:

- Their behaviour is threatening or highly disruptive.
- They make serious verbal threats.
- · They are incoherent or uncontrollable.
- They are making direct or indirect reference to suicide.

If NO, consider using the 4 Rs Approach:

- Recognize
- Respond
- Refer
- Reflect

See reverse.

For URGENT situations:

- If the person is on campus, dial 4444 to connect with Campus Safety Services.
- If the person is off campus, dial 911 and notify Campus Safety Services 4444.
- If unsure if off-campus situation warrants a 911 call, consult the Crisis Line at 613-722-6914.
- After hours, contact Campus Safety Services at 4444.
- Inform your department head and Human Resources (ext. 3634) of the situation.

For NON-URGENT situations:

- · Listen, show concern, be non-judgmental.
- Ask questions to determine what kind of information or referral would be appropriate.
- If referral warranted, provide contact information to appropriate services and encourage the person to get help.
- Encourage them to connect with the Employee & Family Assistance Program (EFAP) for free, confidential counselling. 613-725-5676
- Offer to make the referral for them if they are hesitant but willing to access help.
- If unwilling, respect their decision. Remind them that your door is always open if they reconsider or need additional help.





Mental Health Resources

- In an urgent situation
 - In Ottawa
 - 911
 - Mental Health Crisis Line 613-722-6914
 - Distress Line 613-238-3311
 - Nationally
 - 1-833-456-4566 (Quebec 1-866-277-3553) or crisisservicescanada.ca
- In non-urgent situations
 - Organization sponsored Employee Assistance Program
 - Canadian Mental Health Association cmha.ca
 - Workplace Strategies for Mental Health workplacestrategiesformentalhealth.com





Mental Health Resources

- Mental Health Commission of Canada mentalhealthcommission.ca
- Health Canada http://www.hc-sc.gc.ca/hl-vs/alt_formats/pacrb-dgapcr/pdf/iyh-vsv/life-vie/stress-eng.pdf
- Not myself today notmyselftoday.ca
- Bell Let's Talk letstalk.bell.ca
- eMentalHealth.ca
- National Standard for Canada for Psychological Health and Safety in the Workplace https://www.mentalhealthcommission.ca/English/what-we-do/workplace/national-standard





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