

Activate Wellbeing Toolkit

Preparing for Success Guide



About this Guide

This guide is intended to support leaders, facilitators, wellbeing champions, and others interested in advancing the Wellbeing Strategic Framework and Okanagan Charter within their workplace. It outlines a recommended planning process to ensure that constructive dialogue and actions emerge from engagement with the Activate Wellbeing Toolkit. Use this guide in conjunction with the Facilitators Handbook and AWT PPT to plan your session(s).

Please review this guide in full before you use the Active Wellbeing Toolkit.

About the Activate Wellbeing Toolkit

The Activate Wellbeing Toolkit (AWT) is designed to engage staff and faculty at all levels to identify and accelerate action in workplace policies and practices towards stronger mental health and wellbeing for all.

By engaging in the AWT, you can expect to:

- Take a strengths-based approach to facilitate discussions on mental health and wellbeing.
- Increase awareness and knowledge of your workplace's wellbeing journey.
- Identify and celebrate existing efforts that have positively impacted mental health and wellbeing.
- Collaboratively identify one to three concrete actions that promote mental health and wellbeing in your specific context.

The AWT is structured using a PowerPoint slide deck that guides your group first through context setting and then through the five steps of the AWT. The slide deck can be customized in a number of ways depending on your needs. For example, if your group is very familiar with the Okanagan Charter and Wellbeing Strategic Framework, consider condensing the context setting slides. Or if there is already agreement that "operationalizing" wellbeing action needs work, then you can just focus on Step 3: Operations after identifying your strengths and assets.

If you are a UBC unit and would like additional planning support, schedule a free consultation by emailing: ubc.wellbeing@ubc.ca.

Initial Considerations

- Consider positionality and power across all aspects of the planning process, including how discussion is facilitated. Throughout the planning process, consider your audience needs and how you can create a discussion space so that opinions and experiences can be shared safely. To support this, we have developed a Facilitation Handbook that includes a section on "Creating a Safer Space."
- The AWT takes a strengths-based approach to facilitating conversations about mental health and wellbeing. A focus on abilities, knowledge, and capacity can still generate challenging discussions so we have made sure to reflect this in this Planning Guide and the Facilitation Handbook. As well, mental health support links can be found in the Resources section.

- This process takes time and is best approached as a learning journey with the whole team rather than as a checklist. Take time to slow down, reflect, and ensure the process itself prioritizes wellbeing. Changing systems and culture takes time. Hold on to your commitment to longer-term goals, while starting with realistic actions and learning.
- Progress does not have to only be measured in number of wellbeing actions achieved, you can also use more qualitative measures like depth of inclusive reflection and learnings. For example: What information is uncovered and learned along the way? What voices are heard that aren't usually centered?

Planning for your AWT Session



Planning Step 1. Identify your planning team, including a facilitator

- A team of 3 to 4 people will be helpful in planning the session. This could comprise, for example, administration staff, leadership, wellbeing champions, Human Resources, a facilitator. As you bring your planning team together, consider who has the capacity to support the process.
- Identify the facilitator. This could be the leader or this could be someone else. Who can enhance the group's ability to communicate with each other, think together, and make decisions that everyone will understand and support? Your facilitator does not have to be an expert in wellbeing but should be comfortable supporting the group through the process. We have developed a Facilitators Handbook with activity options and additional facilitation support.
- Book 2 to 3 meetings with your planning team. Consider how much lead time is needed. Collectively, you should expect planning to take between 3-8 hours for meetings and preparation tasks such as requesting Workplace Experience Survey (WES) data and structuring the session activities. Should planning occur over 2 weeks, a month, two months?
- Identify the facilitator. This could be the leader or this could be someone else. Who can enhance the group's ability to communicate with each other, think together, and make decisions that everyone will understand and support? Your facilitator does not have to be an expert in wellbeing but should be comfortable supporting the group through the process. We have developed a Facilitators Handbook with activity options and additional facilitation support.
- Before your first planning meeting, have the team fully review AWT materials (including this document and the Facilitators Handbook). Everything is available at wellbeing.ubc.ca/awt

Decision points

- How often can the planning team meet?
- How much planning time is needed given the team's capacity?
- Who should be part of the planning team?
- Who should facilitate the session?

2. Gather and review relevant information and data

- Talk to your unit's HR contact about accessing Workplace Experience Survey results. Make sure the data you have aligns with the employee group that will participate in the AWT session. Include data that reflects positively as well as data that highlights challenges or areas for improvement.
- Locate the Okanagan Charter for Health Promoting Universities wellbeing.ubc.ca/okanagan-charter and UBC's Wellbeing Strategic Framework. wellbeing.ubc.ca/framework
- Locate UBC's wellbeing indicators for students, staff, and faculty via the Wellbeing Strategic Framework Annual Report. wellbeing.ubc.ca/about/annualreports
- Review information and data gathered with your planning team in conjunction with the AWT PowerPoint and decide what to include in your session. Consider sharing information and data to participants in advance with a request to review before the session.

Decision points

- Do you have the right WES data?
- What data should be included in the PPT?
- Does the PPT need to be customized to fit your unit's context?
- What information could be sent in advance?

3. Design your session format

- Review the Accessible and Inclusive Event Planning Guide to ensure that your session(s) are equally accessible to, and inclusive of, community members who have a disability. You can find the guide here: equity.ubc.ca/resources/accessible-and-inclusive-event-planning
- Identify who should be invited to the session(s). Include leadership, representation of voices that are often left out, those who are already working to advance wellbeing in your unit. As you consider who should be invited, also reflect on how to create space for open and safe discussion of opinions and experiences, as well as what group or power dynamics might be present.
- For larger groups, consider facilitation techniques such as break-out groups, polls, or sticky notes to enable more participation. How can you ensure that challenging conversations or dissenting voices can be supported? See our Facilitator Handbook and the additional tools on the slide deck for more ideas.
- Decide if you want to hold your session(s) online, in-person, or a hybrid. Consider refreshments and time for bio and movement breaks. Book a movement break with the Move U Crew recreation.ubc.ca/get-moving/move-u-crew
- Consider how many sessions are most practical given group size, engagement, and dynamics. For example, you can do all 5 steps in a morning, or hold two sessions with the first focusing on Steps 1-3 and the second session on Steps 4-5.
- Confirm the time, date, and location (or virtual platform).
- Draft an invitation to be sent by leadership, include a clear purpose for attending.

Decision points

- Will the session be in-person, online, or hybrid?
- Who should be invited?
- Will you do AWT in one or multiple sessions?
- How can you best ensure that all participants are able to engage and contribute in the session(s)?

4. Finalize materials

- Adapt the Activate Wellbeing Toolkit PPT to suit your needs.
- Develop your facilitation tools and gather activity resources, e.g., post-it notes, dots, flip chart, whiteboard markers, printed copies of AWT. See the Facilitation Handbook for ideas.
- Confirm roles for the planning team in the session. Are they participants? Co-facilitators? Note-takers? Co-hosts for virtual participants?

Post-Engagement

Review and Assess Progress

Determine how to review progress and next steps following completion of identified actions. At the end of the PowerPoint (slides 22 and 23) you will find questions and considerations to support how you will review and assess progress.

Share Actions and Outcomes

After your session we would love to hear about your engagement with the Activate Wellbeing Toolkit.

Please share your feedback, ideas, and actions you are taking toward stronger mental health and wellbeing via this quick survey: https://ubc.ca1.qualtrics.com/jfe/form/SV_3VohbjHCvUQKZzU

You can also email us with any questions or comments at ubc.wellbeing@ubc.ca

Resources

Land acknowledgements - Respect, Sincerity, and Responsibility

- UBC offers free training in providing sincere, respectful, and meaningful land acknowledgments wpl.ubc.ca/browse/orientation-and-onboarding/courses/wpl-oo-ilpla

Indigenous Strategic Plan

- ISP Implementation Toolkit: indigenous.ubc.ca/indigenous-engagement/indigenous-strategic-plan

UBC HR Programs and Offerings

- Workplace Wellbeing Resources: wellbeing.ubc.ca/workplace-wellbeing-resources
- Workplace Learning offerings: wpl.ubc.ca
- Okanagan Workplace Health & Wellbeing: hr.ok.ubc.ca/health-wellbeing-2
- General Mental Health Resources: hr.ubc.ca/health-and-wellbeing/mental-health/faculty-and-staff-mental-health-resources
- Helping Faculty and Staff in Distress: hr.ubc.ca/health-and-wellbeing/mental-health/helping-faculty-and-staff-distress

Tools for inclusive processes from the Office of Equity and Inclusion

- Intentional EDI Decision-making tool: equity3.sites.olt.ubc.ca/files/2020/10/Intentional-EDI-Decision-Making_Sep2020.pdf
- Balancing tensions and paradoxes in Equity, Diversity, and Inclusion Planning and Action: equity3.sites.olt.ubc.ca/files/2022/04/Toolkit_TensionsParadoxes.pdf
- UBC Okanagan Equity and Inclusion programs and offerings: equity.ok.ubc.ca

Physical Health and Nutrition

- Recreation at UBCO: recreation.ok.ubc.ca
- Recreation at UBCV: recreation.ubc.ca/get-moving
- UBCV Move U Crew: recreation.ubc.ca/get-moving/move-u-crew
- Nutrition Support: hr.ubc.ca/health-and-wellbeing/physical-wellbeing/nutrition

Websites

- Mental Health Commission of Canada Psychological Health and Safety in the Workplace National Standard: mentalhealthcommission.ca/national-standard
- Anti-Oppression Resource & Training Alliance (AORTA): AORTA.coop
- Anti-Oppressive Facilitation for Democratic Process: arts-campout-2015.sites.olt.ubc.ca/files/2019/02/AORTA_Facilitation-Resource-Sheet-JUNE2017.pdf

Books

- Facilitators Guide to Participatory Decision Making by Sam Kaner
- Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers by Dave Gray