



BRAVE

Leadership:

Advanced certificate
program in workplace
mental health and
wellbeing

Module 3: The
ecosystem of
organizational
wellbeing

Participant guide

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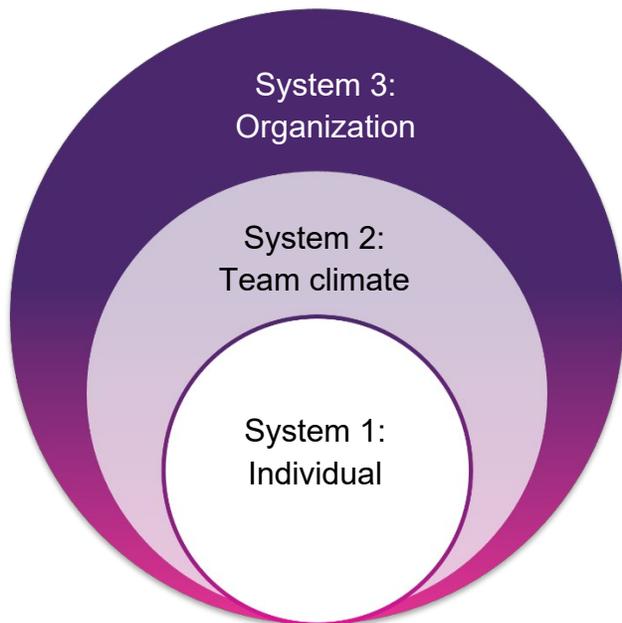
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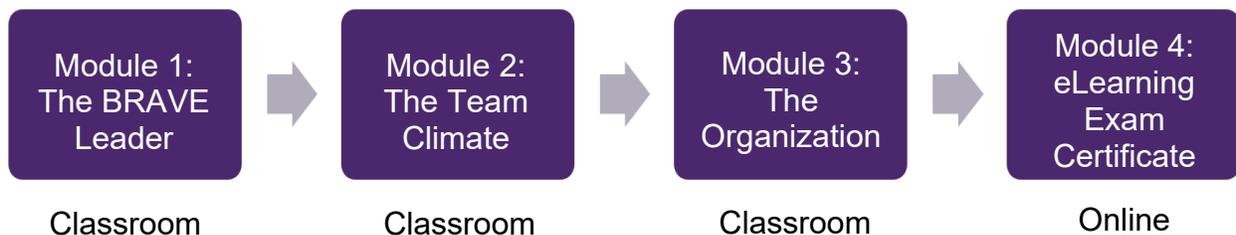
Program overview

The BRAVE Leadership program takes a systems approach to promoting workplace mental health and wellbeing in these times of change and uncertainty. Leaders build their BRAVE Leadership toolkit with skills and practices for proactively cultivating wellbeing at the individual level, within teams, and in the wider organizational context.



Program structure

- **Module 1 classroom:** The BRAVE Leader – Mental health & wellbeing at the individual level (Half-day instructor-led workshop)
- **Module 2 classroom:** The team climate – Cultivating conditions for wellbeing within the team (Half-day instructor-led workshop)
- **Module 3 classroom:** The ecosystem of organizational wellbeing (Half-day instructor-led workshop)
- **Module 4 Online:** eLearning review, exam & certificate



Key program concepts

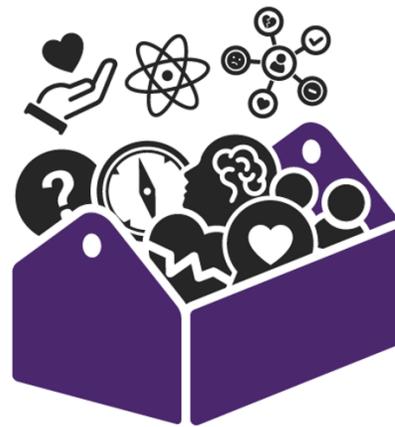
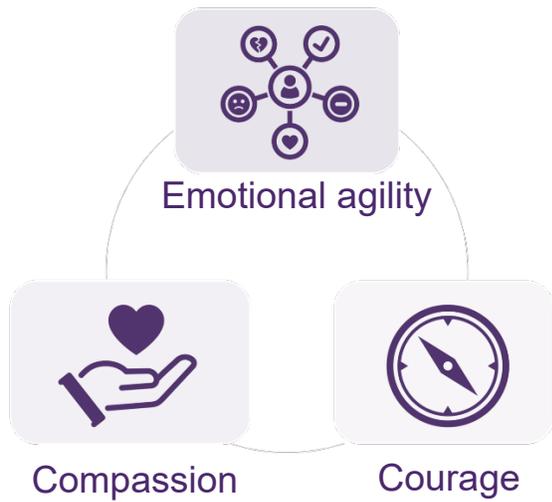
BRAVE Leadership



BRAVE leaders are:

- **Bold:** BRAVE leaders have the courage to act according to values & business needs
- **Regulated:** BRAVE leaders manage their own feelings, thoughts, and behaviours
- **Agile:** BRAVE leaders think and behave flexibly in times of intense emotions or crisis situations
- **Vulnerable:** BRAVE leaders admit to not having all the answers, acknowledge their mistakes, share appropriately, and ask for help when needed
- **Engaged:** BRAVE leaders direct energy and attention into productive action

BRAVE Leadership toolkit

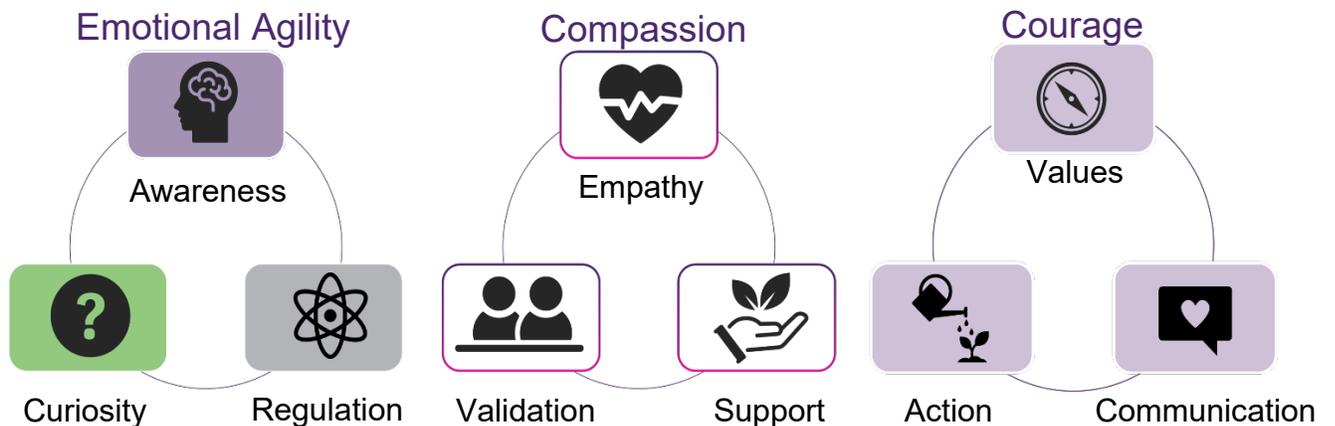


BRAVE leaders need to acquire skills in three areas:

- Toolkit #1: Emotional agility
- Toolkit #2: Compassion
- Toolkit #3: Courage

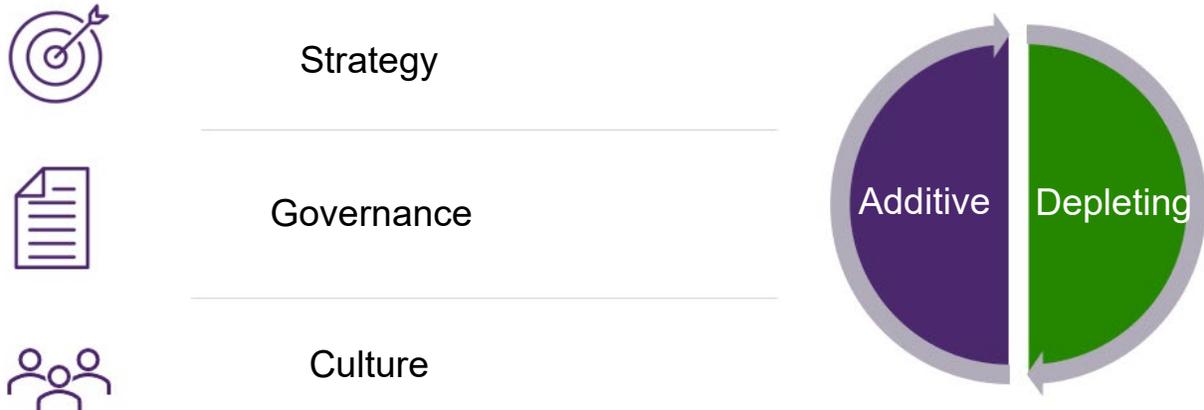
Each toolkit has specific skills and practices explored throughout the program:

| Toolkit | Skills |
|-------------------|--|
| Emotional Agility | Awareness - Curiosity - Regulation |
| Compassion | Empathy - Validation - Support |
| Courage | Values - Communication – Action: Allyship & advocacy |



Section 1: The ecosystem of organizational wellbeing

Foundations of the organizational system



Three foundational systems at the organizational level create the conditions for what work is done and how, how the organization is led, and how people are expected to work together. Each of these has implications for workplace mental health and wellbeing, functioning as additive or depleting factors.

What are these systems?

| Area | What it includes |
|----------------|--|
| 1 – Strategy | <ul style="list-style-type: none">• Mission and vision• Business objectives |
| 2 – Governance | <ul style="list-style-type: none">• How the organization is led and run• Authority, power, policies |
| 3 – Culture | <ul style="list-style-type: none">• Organizational values and behavioural norms• Relationships, civility, respect |



Area 1: Strategy

Organizational strategies shape:

- Priorities: what it does
- How things are done: goals, objectives, priorities
- Everyday activities and functioning in the workplace

To support organizational health and wellbeing, organizational strategies must be:

| Area | What it includes |
|-------------|---|
| Clear | <ul style="list-style-type: none">• Clear and well-articulated mission• Focused business goals and objectives• Cascaded throughout the organization |
| Prioritized | <ul style="list-style-type: none">• Reasonable number of priorities• Defined short/mid/long-term work• Collective sense of direction |
| Resourced | <ul style="list-style-type: none">• Effective resourcing plan to achieve objectives• Human, financial, physical, informational resources |
| Aligned | <ul style="list-style-type: none">• Strategy aligned with organizational mission and values• Strategy aligned across organization |

Organizational strategy and mental wellbeing

1. How does a lack of clear strategy and goals impact mental wellbeing?
2. What ways have you seen a lack of prioritization impacting team members?
3. How can an organization's resourcing impact wellbeing at work?
4. How can a lack of alignment between strategy and organizational values impact wellbeing at work?

Activities: Exploring strategy, the traps and BRAVE leadership

Explore the importance of strategy for mental health and wellbeing.

Activity 1: Strategy and the three traps

Discuss: How can a clear, prioritized, resourced and aligned strategy can influence “the traps” to better support workplace wellbeing? Choose several traps and explore.

Recall the traps:

| | | |
|---|---|--|
| Behavioural traps <ul style="list-style-type: none">• Constant connectivity• Overscheduling• Time vs energy management | Cognitive traps <ul style="list-style-type: none">• Perfectionism• Binary thinking• Urgency/speed• Fix vs. understand | Emotional traps <ul style="list-style-type: none">• Fear/anxiety• Isolation• Helplessness• Frustration• Anger |
|---|---|--|

| Choose a trap: | How can a clear, prioritized, resourced and aligned strategy prevent or reduce the impact of the traps? |
|----------------|---|
| | |
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Activity 2: Discuss a BRAVE strategy

Explore the scenario and discuss the questions below.

Scenario: Karolina, the leader, has managed a top performing team of 20 people for over 5 years. She is driven by a previous manager's support of her during a time of personal crisis early in her career and as a result is a strong mental health advocate, and has supported two of her team members with accommodations.

Context: The organization has been acquired by a larger entity: lay-offs and staffing changes are underway. The organization is shifting from product sales to services.

Karolina reports to the executive team and has some information but is concerned about:

- If/when further layoffs are coming – which is unclear
- The lack of a change management plan to support the transition
- Seeing the team struggling in the absence of clarity and without strategic support for the changes underway
- The impacts of fear and stress created by the uncertainty
- Her team is burning out, disengaging, and losing trust in her and the organization

Discussion questions:

1. What are the possible impacts on individuals, teams, and the organization?
Consider a) how the situation could trigger the “traps” as depleting factors.
2. What actions could a BRAVE leader take to support the team in this situation?
Consider a) direct team & support; b) values (mis)alignment; c) potential “traps”.

Strategy: Your role as a BRAVE leader

Creating strategic clarity and alignment for your team can help buffer them from overwhelm, stress, or confusion, improving wellbeing *and* business outcomes.

Be bold: Build business case and advocate for resources

- Identify what is realistic based on resources at hand and build a case for the additional support that is needed

Be regulated: Cultivate your own emotional agility

- Use your toolkit to regulate your own emotions to prevent reactivity and to positively influence your team's emotional regulation

Be agile: Set priorities and revisit them regularly

- Work with team members to help them prioritize the work that needs to be done

Be vulnerable: Communicate with the team

- Solicit their feedback so you have insight into their experience and can support their concerns

Be engaged: Help create clarity of goals

- Create short-term objectives for the team





Area 2: Governance

The system of rules, processes, and practices by which an organization is directed, controlled, and managed.

- Provides a framework for decision-making, accountability, transparency, and ethical conduct within the organization
- Can contribute to additive and/or depletive factors for collective wellbeing

There are three core aspects of organizational governance:

- Authority
- Power
- Policies

Governance: Authority

Authority refers to who has the rights and permission to make decisions about work and how it is done.

There are many ways authority can be distributed in an organization, along a continuum between:

- Top-down/hierarchy
- Shared authority with autonomy

Reflection: How does the exercise of authority impact mental health and wellbeing in the workplace?

Governance: Authority & autonomy

Crafting a balance between the appropriate exercise of authority and employee autonomy can be an **additive factor** for wellbeing. Responsibility for objectives without authority and influence can lead to frustration, feelings of helplessness or disengagement within the workplace.

Reflection: Describe ways you do, or could, give your team members authority over their work. Do you face challenges to do so?

Governance: Power

Formal power

- Related to organizational roles, policies, hierarchies, decision-making structures
- Visible power structures related to governance

Informal power

- Earned social power from factors like expertise, integrity, trust, reputation, respect earned
- Unearned social power related to identity/social power structures and hierarchies

Leadership & power: Role power and social power

| Role power (formal) | Social power (informal) |
|---|--|
| <p>Role power results from one's position in an organizational hierarchy.</p> <p>Power to:</p> <ul style="list-style-type: none">• Set expectations• Determine workload• Manage and rate performance• Distribute rewards and consequences• Leverage support and resources | <p>Social power results from social standing and can be earned and unearned.</p> <p>Power to:</p> <ul style="list-style-type: none">• Shape workplace culture• Influence people <p>Exists throughout the organization, not just with formal leadership.</p> |

Power: Building trust

Trust is core to the foundation of a healthy workplace, and is key component of your social power as a leader.

When you become aware of something you missed, didn't understand, or make a mistake, be BRAVE:

- **Name** the action – take ownership of what you said/did: “I’m sorry that I made that comment.” (no but!)
- **Name** the impact – validate their response: “That must have been very frustrating. You must have felt like I didn’t appreciate your input.”
- **Name** what you should have done differently: “I should have paused to listen properly and recognize the perspective you were sharing.”
- **Name** what you will do differently from now on: “I’m going to commit to slowing down and listening better.”

Discuss: Recognizing role power and social power

Identify the ways that Sarai, the leader, leverages her role power and social power to address a workplace situation:

A new employee, Martin, joins Sarai's team. He is eager to contribute but feels uncertain in the new role and is nervous about the probationary period. He is experienced in the job function, but new to some of the technology required. At a co-workers' suggestion, he approaches Sarai for guidance.

- Sarai takes the time to listen to Martin's concerns, provides clear instructions on the role and the performance benchmarks expected for the probationary period, and offers encouragement. She shares her own experiences and lessons learned to help Martin navigate challenges he may face.
- After the meeting, she schedules training and mentorship sessions for Martin to build his skills with the tech required for his job. She also schedules a series of 1-1 check-ins with Martin for his first three months to continue the conversation.
- She thanks the colleague who encouraged Martin to speak to her and allocates time at the next team meeting to get feedback from the whole team on the technology they are using.

Activity: Role power and social power

BRAVE leaders use their role power responsibly and build trust-based relationships that grant them social power.

When people believe in and **trust** their leader, they are more likely to be personally motivated to collaborate with and work towards the leader's goal.

1. How do you use your **role power** in how you manage your team?

2. How do you build **social power** with your team?

3. What ways can these sources of power enable you to contribute towards wellbeing within your team and organization?

A reminder: Power in society also shapes power in organizations

Social and systemic factors that exist in society, including prejudices, stereotypes and biases influence the exercise of power, and thus wellbeing, in an organization. To understand how these forms of power are operating, consider factors such as:

- Who occupies formal and informal positions of power in an organization?
- Is there diversity in terms of age, race, gender, disability, sexual orientation etc., of who holds power in the organization?

Reflection: How can diversity of representation in positions of power can have positive mental health and wellbeing impacts on individuals, teams and the organization?

Governance: Policies

Organizational policies articulate the parameters of how the organization operates, including how work is carried out in alignment with the organization's vision and values.

Effective policies:

- Are documented in clear, easy to understand language
- Are understood - through awareness and training
- Are operationalized through implementation plans, resources, clear priorities
- Monitored and adjusted to create results
- Enforced consistently and fairly

Reflection: What are some examples of your organizational policies that support your ability to create a climate of wellbeing for your team? What are some challenges you have faced in implementing those policies?

Area 3: Organizational culture

Organizational culture refers to the shared beliefs, values, attitudes, norms and behaviours that influence the day-to-day experiences people have at work.

Workplace culture has a significant influence on the psychosocial factors that contribute to mental health and wellbeing.

Aspects of organizational culture important for wellbeing include:

- Civility and respect
- Values alignment

Culture: Civility and respect

What are the characteristics of civility and respect? How can this aspect of workplace culture be an additive or depleting factor for mental health and wellbeing?

Workplaces characterized by civility and respect:

- Promote greater trust among team members
- Are perceived to be fairer and more equitable
- Experience high levels of team performance
- Create greater engagement

Workplaces that lack civility and respect lead to:

- Increased levels of exhaustion
- Greater conflict
- Increased levels of anxiety
- Disengagement
- Workplace violence
- Loss of talent
- Loss of resources

Culture: Values alignment

Every organization has a set of core values that shape business strategy, decision-making and workplace relationships.

- Values alignment is an additive factor for mental health and wellbeing
- Disconnect between values and workplace culture can result in heightened stress, distress, disengagement, frustration, incivility and disrespect within teams
- While no individual or organization can attain 'perfection' in values alignment, ongoing investment must be made to align organizational practice and values in order to promote a positive, inclusive workplace culture

Your organizational values

- Organizational values are the guiding principles that define the beliefs, standards and principles the organization stands for.
- As a leader, you are responsible for upholding and promoting your organization's values.
- Organizational values offer you a guide to assess difficult decisions or challenges.

What are your organizational values? Record them below:

| |
|--|
| |
| |
| |

How do you, or could you, draw on them as a BRAVE leader?

| |
|--|
| |
|--|

Explore: Civility, respect and values alignment

How does a lack of civility and respect, and misalignment with organizational values, impact mental wellbeing in the workplace in system 1, system 2, and system 3?

Activity: Respond as a BRAVE leader

Read the scenario(s), discuss in groups and respond to the questions below.

Scenario 1: Your team consists of individuals with different levels of experience and expertise. One team member, Alex, is highly skilled and knowledgeable in their field. However, Alex tends to have a condescending attitude towards others, often dismissing their ideas and suggestions without giving them proper consideration.

Another team member, Maria, is relatively new to the team and is eager to contribute her ideas and insights. However, whenever Maria tries to share her thoughts, Alex interrupts her, undermines her contributions, and makes her feel insignificant. As a result, Maria starts to feel demoralized and undervalued. She becomes hesitant to speak up during team meetings and starts doubting her own abilities. The lack of respect and civility from Alex creates a toxic atmosphere within the team, hindering collaboration and stifling creativity.



Scenario 2: Lee is a team member who manages the relationship with a high value client. This client contact's behaviour was always challenging but has become uncivil. Lee works hard and does their best to meet the client requests, but the client continues to harshly criticize their work and occasionally makes indirect comments about their gender/race/sexual orientation that leave Lee feeling uncomfortable. Your organizational values call for a workplace in which psychological safety and wellbeing is a high priority, but the Lee feels that the client relationship is being put ahead of their feelings and values.

Activity discussion questions:

How can you draw on organizational values to map out your actions in this situation?

What would it look like to demonstrate compassion & employ courageous communication (empathy, validation, support) when speaking with those involved in the scenario?

How would you engage courageously using the BRAVE Leadership toolkit?

Section 2: Leaders' role in influencing organizational wellbeing

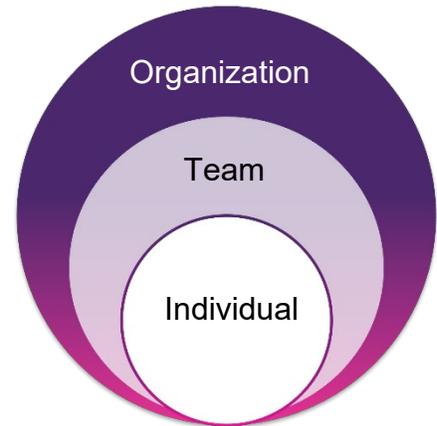
BRAVE leadership in the organizational ecosystem

Promoting mental health & wellbeing in the organization involves:

- Responsibility for the care of system 1: Yourself

Responsible use of power and influence to impact:

- System 2: The team
- System 3: The organization



Use your BRAVE Leadership toolkit:

| Toolkit | Components |
|-------------------|--|
| Emotional agility | <ul style="list-style-type: none"> • Awareness • Curiosity • Regulation |
| Compassion | <ul style="list-style-type: none"> • Empathy • Validation • Support |
| Courage | <ul style="list-style-type: none"> • Values • Action • Communication |



Now, lets add two additional components to your BRAVE toolkit for courageous action to promote mental health and wellbeing in the organizational system:

Awareness: Drawing on your emotional agility to learn more about a situation



Allyship & advocacy: Sustained values-based courageous action and support





BRAVE toolkit – 1: Awareness

You cannot influence what you are not aware of. Develop your awareness of factors that impact wellbeing in your organization:

Individuals & teams:

- Awareness of others' experiences, challenges, needs and goals

The Leaders' role:

- Awareness of your own sources of power, influence, and resources you can mobilize to respond to challenges.

Organizational context:

- Awareness of organizational level factors that impact mental health and wellbeing in your organizational context.

Scenario Part 1: Anil's experience

One of your team members, Anil, has some disability-related accommodations in place that have supported him in being a continual high performer on the team.

- A promotion opportunity comes up within your team structure.
- The position involves considerable collaboration and coordination with other team members to support during a time of increasing workloads and changes in the work environment.
- You offer him the promotion/invite Anil to apply because of his meticulous organization skills and his demonstrated ability to meet organizational needs and deadlines, which would be a support for the rest of the team, especially in the context of current challenges.
- You are surprised when Anil turns down the opportunity.
- You want to understand what might have factored into his decision-making and whether it was just a personal decision or may have implications about the team or organizational environment.

Consider:

- What traps might a leader fall into here?
- What can you do to build an understanding of Anil's experience?

Awareness: Others' experiences

Good practices for building awareness of your team members' experiences:

- Don't wait for a problem: cultivate ongoing awareness of your people and your team.
- Build knowledge of the complexities of individual and team experience in the organizational context.
- Take active measures to solicit input and ensure open communication with your team members and colleagues.
- Have an active open-door policy and operationalize regular check-ins.
- Suspend what you think you know in order to learn from another person's experience with kindness and humility.

What could you ask to learn about others' experiences at work?

- "What do you enjoy most about your work? Least?"
- "How would you describe the strengths of our team? Challenges?"
- "I want to be able to support you better, so I need to know how X is impacting you. Would you be willing to share with me?"
- "I noticed you've been quiet in team meetings. I'd really like to hear from you."

Scenario Part 2: Anil's experience

You schedule a check-in with Anil.

At your check-in, he shares that he was interested in the opportunity, but he shares his main concerns:

- 1 - That he might not be able to keep his accommodations in place (flexible hours, time off for counselling appointments) and that others would find out about them;
- 2 - He was concerned about being successful in the collaborative aspect of the position because he communicates differently than his team members and finds it hard to connect with them.

Now that you have this awareness of Anil's experience, consider:

- What impact could this have on his mental health, wellbeing and engagement?
- How can you support Anil?

- What might this indicate about the team climate?
- What else do you need to know?

Awareness: Organizational factors

Reflect: In what ways could organizational factors be combining to impact this scenario?

Consider:

- Organizational culture
 - Power balance in the organization
 - Strategy
 - Diversity & representation
1. How can you get this information as a leader?
 2. What steps can you take to build your awareness?
 3. Why should you do this?

BRAVE toolkit: Allyship & advocacy



Allyship & advocacy is about:

- Using your **social and role power** to be a partner, collaborator, and supporter to cultivate a mentally healthy organizational environment
- Implementing **organizational values** and taking informed action to **advocate** for change beyond the single issue at hand

Allyship and advocacy: BRAVE leadership in action

BRAVE leaders are committed to:

- Building their own **awareness**
- **Advocating** for others
- Stewarding & implementing **organizational values**
- Acting as **allies** to promote change: includes sharing your learning and experience addressing team challenges to mental health and wellbeing with other leaders to support wider organizational adaptation.

Working with your BRAVE toolkit: A systems' approach

When you are facing a challenge, activate your toolkit at all systems' levels.

Activating your emotional agility toolkit in system 1 - yourself:

- Awareness of the situation
- Curiosity – what I am feeling and thinking?
- Regulate – emotions, thoughts, biases

Activating your compassion toolkit in system 2 – with your team:

- Empathize with the person in the situation
- Validate their reality of the experience
- Enable support for the individual and team to work on the challenge

Activating your courage toolkit in system 3 – the organizational context:

- **Assess:** Alignment with organizational values
- **Allyship & advocacy:** Take BRAVE actions and share & elevate what you learned
- Explore possible action and support within the organization

Courage at the organizational level

What would allyship and advocacy look like at the organizational level in response to the awareness you have developed from a team member's experience?

Ask yourself:

- Has the mark been missed on implementing organizational values?
- What policies and strategies already exist to support?
- Who do I need to work with to share my learning?

Activity: The As of BRAVE leadership

Read the scenario(s) and discuss the questions below.

Scenario 1: Vince's experience

You manage a team that works remotely 95% of the time. The team keeps in regular contact using an online collaboration tool that allows you to chat with each other in real time.

A few months ago, your organization was merged with another organization and there have been technology changes rapidly introduced, including a switch to a new online collaboration tool. Team members have not yet been trained on this tool and have had some struggles adapting.

One team member in particular, Vince, expresses a high level of frustration with the changes. He shares with you that he feels disconnected from the team and the organization. He shares his fears about potential job loss as he went through a similar situation in a previous workplace.

Scenario 2: Raya's request

Raya approaches her leader and confides that she has a diagnosis of ADHD.

She explains that she has been having difficulty since cubicle locations were moved and now being so close to the elevator is distracting for her and causing her to feel more depleted and overwhelmed by the end of the day.

Scenario discussion questions

How can you act as a BRAVE leader in this situation at all three systems' levels?

Build your **awareness**: better understand the situation for the individual and team?

Assess **alignment** with organizational values:

Advocate and enact allyship:

What changes can be made to support a struggling team member? Others?

How can you share what you have learned to inform the larger organizational context and advocate for change?



BRAVE leadership is a shared responsibility

BRAVE leadership is not a solo endeavour.

Allyship also involves building strong relationships and support in order to have a ripple effect in the wider organization.

How can you work with your leader, and other leaders, in order to take action on organizational issues that erode mental health and wellbeing? What are your areas of influence?

Section 3: BRAVE leadership in a VUCA world

Collective wellbeing in VUCA times



Remember VUCA? The volatile, uncertain, complex and ambiguous times we have been living in that have led us to navigate unprecedented challenges and change. These are “not your average crises” and include situations such as:

- Pandemic(s)
- Social justice crises related to diversity, inclusion and belonging
- Climate change/natural disasters
- Economic volatility
- Employment restructuring
- Rapid change
- Community violence and/or conflict
- Multiple crises at the same time

Systems' impacts of crisis

- Crisis impacts all systems' levels: Individuals, teams, and organizations.
- Because these systems are an interrelated and mutually influencing ecosystem, acute and chronic stressors impacting one system ripple into the others.
- What occurs at the individual level impacts the organizational whole, just like what happens at the organizational level shapes the lived experience of individuals and teams.
- Crisis is a trigger for reactivity. Reactionary responses in VUCA contexts can increase the negative impacts on people and organizations.
- How we handle crisis directly shapes outcomes for mental health and wellbeing across all systems.

Crisis: Challenge and opportunity?

Crises bring challenges, but also offer opportunities. Consider how challenges can be leveraged for **collective wellbeing** in system 2, the team climate:

- **Connectedness:** Overcoming challenges through spirited teamwork builds team cohesion and reduces individual burden
- **Inspiration:** Change creates opportunity for creativity, growth, stimulation
- **Contribution:** Recognition of talents & sense of collective purpose
- Also: Recall the individual and team impacts of **kindness** as an additive factor for mental health

Discussion: Looking back

Look back to a time when you had to navigate a major crisis in your workplace.

1. What were the system 1, 2, 3 impacts?
2. What happened that was reactionary?
 - Cognitive, behavioural, emotional traps?
3. What happened that was BRAVE?
 - Bold, regulated, agile, vulnerable, engaged
 - Tools: Emotional agility, compassion, courage

Activity: Crisis – challenge & opportunity

Discuss how you weathered a crisis situation in your team and organization.

As you explore the questions below, consider the role of factors that support wellbeing in the organizational climate:

- **Strategy:** Clarity of priorities, objectives, timelines, resources
- **Governance:** How leaders use role power & social power
- **Culture:** Alignment with organizational values

Looking back at the reaction/response to the crisis in retrospect, what else could have been done to:

1. Prevent some of the impacts: What proactive measures do you wish had been in place before the crisis hit?

2. Mitigate the impacts: What could have been done in real time to respond (vs. react) to the crisis and its impacts in the workplace? Think BRAVEry.

3. Integrate the learning: Was there a pause to reflect on what was learned and to make changes for the future? What takeaways should have been integrated into organizational functioning?

Recap: Responding BRAVEly in contexts of crisis

- Crises bring very real challenges and risks, but also can offer opportunities to cultivate additive factors for mental health & wellbeing
- All systems at work influence each other: Individuals, teams, and the organizational climate
- Cultivating BRAVEry in yourself, your team and the organizational climate can reduce the risks created by reactionary behaviours
- Leaders carry responsibilities related to their role, but no leader can address a crisis alone
- BRAVE leadership in times of crisis fosters of relationships of mutual support for leaders as well as teams



Section 4: Action planning

The organization as a living system

“...together, many trees create an ecosystem that moderates extremes of heat and cold, stores a great deal of water, and generates a great deal of humidity. And in this protected environment, trees can live to be very old...a tree can be only as strong as the forest that surrounds it.”

- Peter Wohlleben, The Hidden Life of Trees

Action planning: What is the next BRAVE step you will take?

Plan out your next steps in implementing your learning and being a BRAVE leader.

1. What BRAVE steps are you already taking that you will continue?

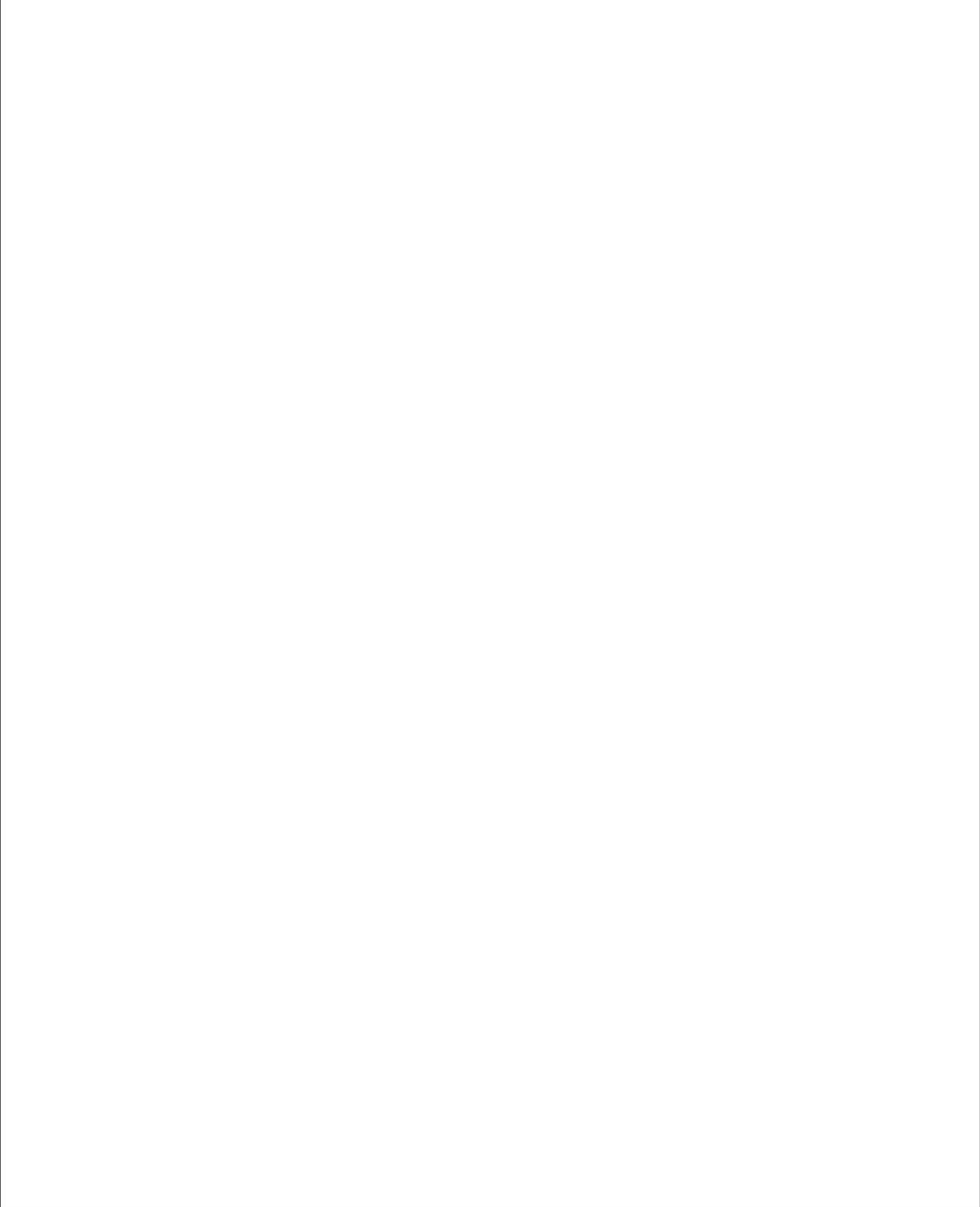
2. What are the next 2-3 BRAVE steps you will take?

3. What BRAVE tools will you use to foster your own wellbeing?

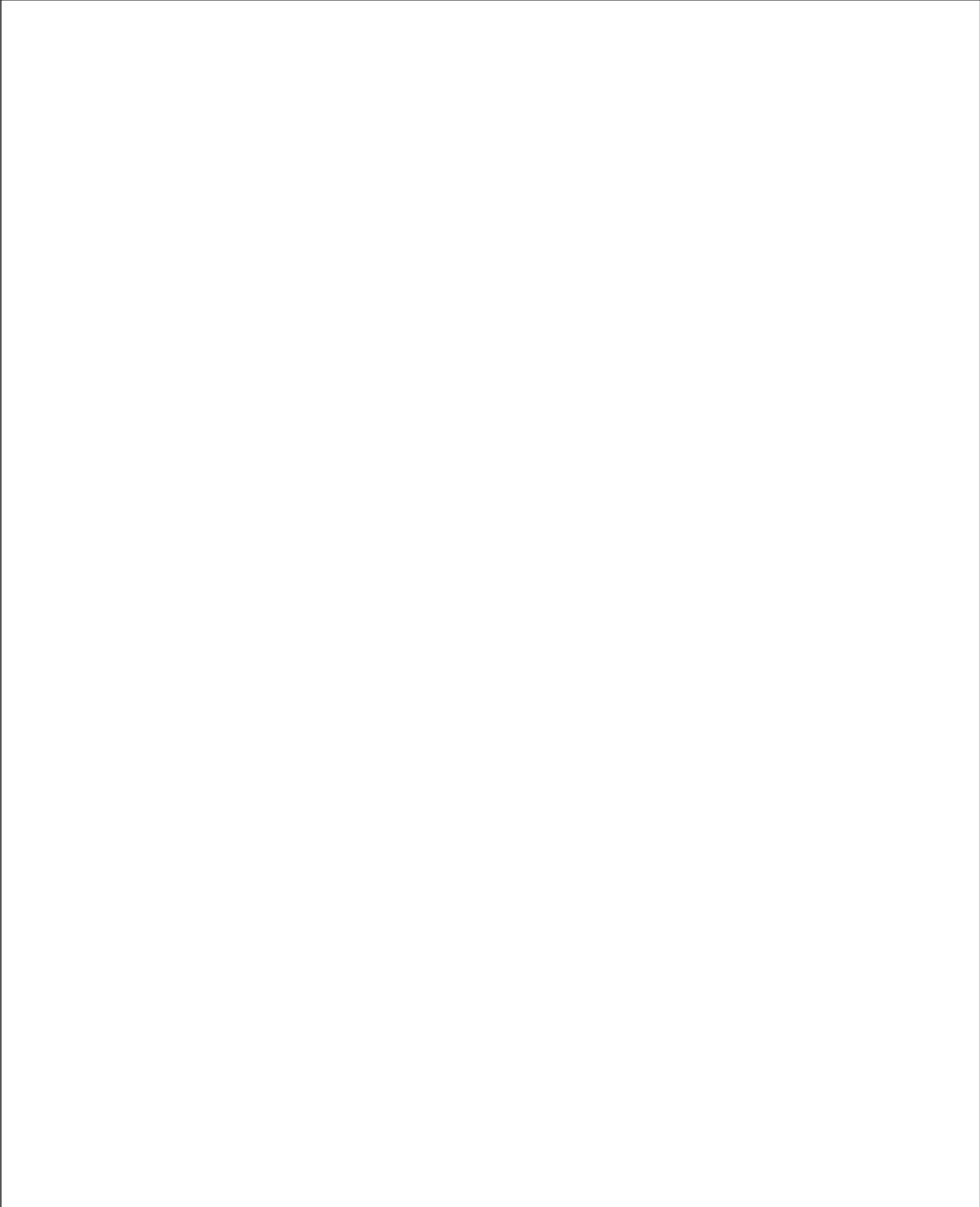
4. Consider talking to your team about BRAVE leadership. What would you tell them? How could you explore what it means to be BRAVE as a team?

5. How can you be BRAVE together with other leaders to foster wellbeing in the organizational climate?

Notes pages



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