

Mental Health Podcast Part 1

SPEAKER

Mandeep Bains

TRANSCRIPTION

Good afternoon. My name is Mandeep Bains, principal at CPA Canada. In today's podcast, we'll be talking about mental health and how it could impact small and medium-sized practitioners.

We'll be dividing the discussion into three key sections to help you explore and better understand this topic. First, defining mental health and how the term may have different meanings for practitioners.

Two, reviewing examples of how mental health issues can impact you, as a practitioner, both on a personal and professional level.

And finally, three: discussing how you and your firm can develop effective strategies to address mental health issues as they arise.

Throughout this chat, we'll build on the mental health policy framework for small and medium-sized practitioners that's available on the CPA Canada website.

On behalf of CPA Canada, it's now my pleasure to introduce today's panelists who are part of this special podcast.

Our first panelist is Debbie Gorsline, FCPA, FCMA. Debbie is a partner at Anderson Gorsline Chartered Professional Accountants based out of Calgary, Alberta. Debbie is part of a small firm whereby she and her partner work with small and medium-sized owner managed businesses in a variety of industries.

Our second panelist is Susan McIsaac, FCPA, FCA. Susan is a partner at McIsaac Darragh Chartered Professional Accountants in Amherst, Nova Scotia. Susan obtained her designation with Grant Thornton before opening her own practice in 1999, with a staff of five. The firm has grown steadily since, and now is a two-partner firm with a staff that varies from 16 to 18 people, with CPAs, students, accounting technicians and support staff.

With its growth has come many changes and challenges, but there isn't a day Susan wishes her career has taken any other path.

And finally, our third panelist is Brianna Courneya. Brianna is the HR and Culture Manager with LiveCA, LLP, a 75-person Cloud accounting firm that was launched in 2013. The LiveCA team is fully remote, with everyone working from home or anywhere where there is good WiFi.

Brianna joined the LiveCA team four years ago as an onboarding specialist, and has spent the last three years working HR and Culture with the team.

Welcome to the podcast, everybody, and we're excited to have you.

So, the first part of this podcast, we want to talk about introducing what mental health means for small and medium-sized practitioners, or SMPs. So, mental health is a topic that affects everyone, both at work and in life. For many SMPs, this is an area where they may not be entirely comfortable talking about the subject.

As mentioned before, in this podcast series, we'll focus on the topic of mental health; how mental health impacts both SMPs and their staff; and how SMPs can come up with mental health initiatives to approach and deal with this topic.

But, before going into in-depth discussion on mental health, it's important that we establish a common understanding of what the term 'mental health' is. So, this first question is going to go to the entire panel, here, as mental health is a topic that affects everyone, regardless of age, gender, race, occupation, and so forth.

So, as a small to medium-sized practitioner, or an SMP, can you briefly share with us how you define mental health, and what it means to you? So, first, I'll go to Debbie to get her response to the question.

Debbie Gorsline

Thank you, Mandeep. To me, mental health is my individual wellness, whether it's my mental or physical wellness, that helps me cope with daily activities. It allows me to deal with stressful situations more effectively, whether they're personal or business situations.

Mandeep Bains

Perfect. Then I'm going to ask Susan, here, to build upon Debbie's response there to add some insight to how you define the term 'mental health'.

Susan Mcisaac

Thanks, Mandeep, and I'll pick up on what Debbie said about stress, because I think I've always associated mental health closely with stress and how someone is able to cope with, or has difficulty coping with, the stresses in their life – maybe, I think, a little more broadly now as a component of overall wellness and try to remember to deal with our physical health. We deal with our mental health, that holistically, it's our wellness or our wellbeing as an individual.

Mandeep Bains

All right, that's great in terms of providing a definition for everyone on what mental health potentially means.

And then finally Brianna, from an HR perspective, how would you define mental health, and what does it mean to you?

Yeah, I guess I would say – and to build on what was just said – I really have a broad definition as well, where my definition of mental health includes my emotional wellbeing, social wellbeing, and my mind's health. So, when I feel I am really mentally strong and healthy, I am expressing my emotions, I'm fulfilled socially, and I have a community of people around me that I support, and they support me. And I am healthy physically by exercising, sleeping well, eating well, and you know, stimulated and challenged at work.

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I think my mental health can suffer when I am not giving time to one or more of those areas. For me, that can link to stress, fatigue and anxiety, so it's really worth investing in all of those areas.

SPEAKER**TRANSCRIPTION**

Mandeep Bains

Thanks for that. And as everyone can see and hear is that mental health expands a wide range of topics and particular areas, so there's not really one common definition of mental health, as everyone was able to expand upon here.

Now, I'm going to go back to Brianna to ask you to provide your thoughts from an HR perspective on what you've heard are some alternative definitions of mental health that you heard from an SMP context.

Brianna Courneya

Yeah, I guess I would say to that question that I think everyone's definition around mental health is a little different based on what's relevant to them, and also how supported the topic of mental health was growing up for them, and in their community.

I haven't necessarily heard of definitions that are far outside of my own, but perhaps aspects of what I think mental health is, is not relevant to somebody else.

I think when it comes to mental health, we all have different journeys, and what's most important is to respect where the other person is coming from. It may not be my experience, but it is just as relevant.

Mandeep Bains

And that's a great point to make a note of, is that everybody's definition, interpretation, may be different, but then it's something that everyone has to be cognizant of. And I'll give Susan and Debbie, here, just a couple of seconds to chime in if there's anything you wanted to build upon that from an SMP perspective you heard on any alternative definitions.

So first, I'll go to Susan, there, and then I'll go to Debbie to add any additional remarks. So, Susan, do you have anything else to add?

Susan Mcisaac

Mental health is often associated with personality and an individual very personally. But part of the reason, I think, that we often have trouble talking about it, because it's very much about ourselves and how we're interacting with others, and how we're dealing with the day-to-day of our lives.

Mandeep Bains

That's great in terms of something to, everyone needs to think of, there. And finally, Debbie, do you have anything else to add, there, on what Brianna and Susan have said, here?

Debbie Gorsline

Yes, thank you. Actually, to expand on both. I agree with exactly what they've said, and as Susan has brought up, the mental illness part, and I think there's still a lot of stigma today with regards to that. And I think we need to look at getting rid of that stigma, because I think the stigma stops people from seeking help and talking about it.

Mandeep Bains

That is a great point to make a note of, and that's something that we'll expand upon as well in terms of talking about later in this podcast here, too.

So now, we've talked about a bit of the definition of mental health. The next part of this podcast will focus on talking about examples of common mental health challenges that SMPs may potentially face.

SMPs and their staff are constantly faced with internal and external pressures, and this can lead to feelings of anxiety, loneliness, high levels of stress. And we have to make a fact that we're all human, so sometimes this can get to be too much. And in certain cases, these feelings can create more serious mental health issues such as depression, mood swings, etcetera.

So, I'm going to focus the next question to each of the panel, here, but provide different perspectives on their background. So first, Debbie: as a sole practitioner, can you describe for our listeners why you believe mental health is important? And if you can, please share a couple of examples of how mental health may affect sole practitioners specifically, and why sole practitioners should not ignore the topic.

Debbie Gorsline

Thank you, Mandeep. For sure. Well, as sole practitioners, generally we work on our own, and so it's very easy to get caught up in things and focus on the client needs instead of our own mental health. And by not taking care of our own mental health, it can lead to increased stress, anxiety, some self-isolation, and eventually burn out, and that would affect our productivity and our ability to be able to serve our clients.

So, for some examples, actually, a number of years ago I took a mental health journey of my own. I'm no mental health expert, but I looked into what my life was like, how I was feeling at the end of the day, things like that, and determined that for me, fitness was a very important factor of my mental health.

Being a practitioner, we all know busy season. We're taught that's what you focus on; you don't do anything else, all you do is work. And because of that, I used to stop my workouts in March and April. And I really started to notice that how it was affecting me, as in my individual person, my attitude towards work and everything.

And so, I decided that I wasn't going to do that anymore, and I slowly started incorporating workouts back into my life in March and April, and even if it meant that I had to leave to go do my workout and come back later in the evening to work, I realized that it helped me focus better.

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It improved my attitude toward many things, and it even made me more effective and happier.

Another thing that I've done also in my life is, no matter how supportive our family and friends are, they don't understand a lot of the challenges practitioners face, and how that could affect our mental health. So, I've developed a group of colleagues that I could call on when I'm having a stressful day, or just need to talk. And we just, you know, sometimes it's just easier to talk to somebody that can relate or understands what you're going through.

And just, you know, even maybe if they could provide some insight on it, it makes life a little bit easier. I know a lot of practitioners will look at the framework we've developed and think, oh, that's a lot of steps; that's not practical to us, you know, really.

But I do encourage you to look at them, because there's a lot of great things that have been brought up in them, and they may be areas that you can consider that could help you with your own mental health.

SPEAKER**TRANSCRIPTION**

Mandeep Bains

I'm going to shift over to Susan, here. Susan, you're a partner at a smaller firm, which is bigger than a sole practitioner, there. So, can you offer your perspective on why mental health needs to be addressed more openly by SMPs? And, like Debbie, it would be great if you could include a few potential examples based on your experiences and observations.

Susan Mcisaac

Sure. Thanks, Mandeep. I think there's two sides to it for most practices. One is clearly the business side. We want our staff to be as healthy as they can be, to be the most effective in their jobs, to be productive and reliable, and, you know, all the things that we put on a good staff member. So, strictly from a business perspective, looking at the overall wellness and the mental health of our staff, and considering it as important.

But I think with smaller firms in particular, there's also a really important personal side that, in general, small practitioners know their staff well. The turnover rates are usually pretty low, so you've got staff you've worked together for years. They've grown with you, you know; their family, their family life cycle, and they feel like part of your family in many ways.

And I think partners and practitioners in small and medium firms feel a responsibility for their staff and for their wellness. I'd say all the practitioners that I know of are willing and proactive in making accommodations for physical health, stand up desks and ergonomic chairs and encouraging walking and healthy challenges, and trying to bring in good snacks, that kind of thing.

We're just a little bit slower in recognizing our role, I think, in the overall wellness and the mental health wellness of the people that we work with - our coworkers, our staff - and we need to recognize that the challenges our staff face are individual, and they're expressed in different ways. This goes to part of making the business environment and the personal work environment much more effective and more satisfying for everybody.

Mandeep Bains

No, exactly, there. Just that we always have to be cognizant that we're humans. We can't be, we're not machines, so it's not like we can keep on going and going and going on that part, there. So, thanks for that, Susan, for that great insight.

And then from next part to you, Brianna, I know you're not an SMP, but you provide great insight from an HR perspective. And while none of us are formal mental health professionals - I want to reiterate that, here - from a holistic point of view, what do you see as the most common type of mental health issues that SMPs and their staff may potentially face?

Brianna Coureya

Yeah, yeah, thank you. Well, I would say - I mean, obviously there's, you know, especially during busy season, there's the typical busy season work stresses. But honestly, I would say I've seen a lot of things just having to do with personal life. Anything, like, things that any of us may go through. You know, personal health issues, family health issues, you know, a loss of a family member, close friends.

And I would say now, especially during the pandemic, there's really two sides of that. So, dealing with, first of all, we're living through a pandemic, which is pretty life-changing for all of us, so there's stresses that come with that. You know, having to be in lockdown or not being able to see family and friends.

But on the flip side of that, the changes since we're a remote team, now our team is dealing with situations of, you know, having children in and out of school or home care and daycare; children or partners now being at home with them while they're used to working quietly at home. You know, there's been a lot of changes in the last year that I've seen coming up that are definitely impacting people's mental health.

Mandeep Bains

Excellent thoughts provided by the panel in regards to what they see as the most types of mental health issues that SMPs and their staff may potentially face.

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Now, let's pivot to explore more about the topic of what are potential mental health warning signs that can pop up. I'll first go to Brianna, and then to Susan, and ask you guys to weigh in on what you'd identify as some potential warning signs that SMPs and senior level staff should look out for in their employees.

Brianna Coureya

Yeah. So, I would say for me, on a fully remote team where I can never actually see my coworkers in person, I think we learn to pick up cues from video calls, our team members' online presence, and how they communicate.

So perhaps if people are shorter than usual in their responses, if they are cancelling scheduled calls, presenting signs of stress or anxiety on calls when you are talking with them, you know, missing work or deadlines, or you notice that they are really over-working or working unusual hours.

I think in a remote setting it can be easy to assume that everything is fine unless someone speaks up. But often, there are cues we can pick up on, or a framework that can be put in place for monitoring things like overwork.

I think there's a few ways of approaching this conversation when you think someone is having mental health issues. You know, it's good to already be having the conversation with the team, you know, from leadership down, to make it clear that it's a safe space to talk about. And then making it clear who that person can speak to, whether it be their manager, an HR manager, or someone else on their team.

Mandeep Bains

All right, that's great insight there that our listeners can see and potentially look at in terms of what potential warning signs can exist. And then I want to ask Susan, there, to follow up here on what Brianna said, is that, from a practitioner's point of view, is there something that you have seen where you suggest to our listeners just to be aware of potential warning signs that could exist of mental health issues within a practitioner's, and as well, within their employees?

Susan Mcisaac

I think there can be signs on both the work side and the personal side. On the work side, maybe they're just not doing as well. Their files aren't as good, they're missing issues, things are being completed not to the same level as they have been. They're not as satisfactory; they may seem sloppy to us. Maybe time management is an issue, not getting things done by deadlines, not able to juggle as many jobs as they have in the past. Maybe relationships with coworkers, or even clients, are getting more difficult.

We may be aware of personal issues at home. And we might see these things as performance management issues, but I think we need to step back and consider what the reasons or the root causes are for these behaviours, because often, those are signs that someone is having mental health challenges, that they're going through a difficult time.

We may see an employee keep more to themselves, not participate in, or not enjoy, their normal activities, or any social activities that may be going on at work. They may stop taking care of themselves the same way that they have; their personal habits may start to decline, and it was interesting when Brianna was saying they're fully remote, so she's used to trying to pick up the cues from people who she isn't seeing face to face, day to day.

Most practitioners have dealt with that at least somewhat over the past year, that we're managing staff, or even if maybe we're lucky enough to be in the same office at the same time, we don't see each other all the time. We keep to ourselves more. Often when we see each other, we've got a mask on. So, it may be more difficult to pick up the cues. But if we stop - if behaviour seems different, to stop and think and say, maybe there's more to this than I'm thinking there is or expecting there is.

Mandeep Bains

For sure. No, exactly, especially in the COVID times right now, we're wearing masks and you're not even seeing the facial expressions of people. It's something that I've just, you never would have thought of, even a couple of years ago. It's just like, okay, everyone's not a robot, so there's more to meet the eye, there. So, just to keep a watch out there for.

So, no, that's great insight that you guys were able to bring there of potential warning signs.

So, one thing that practitioners may not think of, and yourself in terms of audience may often take it for granted is that, as a practitioner, a lot of the times for sole practitioners, they will work independently and not have to worry about overseeing the mental health of their staff.

But practitioners, especially sole practitioners but also practitioners in smaller firms, may be inclined where their clients may approach them in terms of talking about a mental health issue, or deal with something that may come up. So, this question will be for more towards Debbie, is that, whenever this type of situation comes, or situations arise, how do you believe SMPs should approach the issue when talking to their clients about potential mental health issues that may come about?

Debbie Gorsline

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That's a really good question, Mandeep, and you're really correct on that. I don't see us maybe being the experts in advising them, but a lot of us are very close with our clients, and we're probably their sounding boards. And, you know, when it comes to just listening to them and being there for them, sometimes that's the best thing we can do. Whether it's them complaining about the government and taxes, or even just talking about a family situation because, you know, we do know our clients that way, too.

So just being there and listening to them, I think, is the biggest part for them. But as a practitioner, and especially if they're talking about taxes or things like that, we always maybe are there to want to solve their problems, and we have to remember that we're probably maybe at this point being part of their support group versus their group that needs to solve a situation.

So, we have to remember that we can't let it affect our mental health, because if we're feeling that we're not able to help our clients, we may get down on ourselves. So, I think just we have a two-sided situation here: being able to listen, but also remember that we have to keep our mental health strong so that we can be there for our clients.

I've never been in this situation where a client has asked me to advise them on a mental health issue, but if they did, I would never give them specific advice. But I would guide them to the resources that are available, and I think the framework that we've developed has a lot of really great resources, whether it's in Alberta or any part of the country. So, I would definitely do that. And, you know, sometimes just that random phone call just to say hey, how's it going, sometimes helps them out, too.

Mandeep Bains

We thank you for listening to Part 1 of this special CPA Canada mental health podcast. Please click on Part 2 to listen to the conclusion of this podcast, whereby we discuss what steps SMPs can take to mitigate work stressors and promote personal and professional wellbeing.

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