



*THE SENIORS' MENTAL
HEALTH POLICY LENS:
FACILITATOR'S GUIDE*

**A practical, evidence-based guide for
those wishing to apply the Seniors' Mental
Health Policy Lens in a workshop setting.**

Marian Krawczyk, PhD (ABD)
Dr. Penny MacCourt

Contents

Purpose of the Guide.....	3
Designing Your Workshop Purpose.....	4
Qualities of a Good Facilitator.....	5
Tips on How To Be a Good Facilitator.....	6
Equipment Requirements.....	7
Preparing for Your Workshop.....	9
Running Your Workshop.....	13
SMHPL Workshop Checklist Summary.....	17
“Selling” the SMHPL.....	19
SMHPL Exercise Templates.....	20
SMHPL Case Studies.....	22

We would like to thank all of the people who have conducted, and participated, in a SMHPL workshop. We would particularly like to thank those facilitators who provided their experience and suggestions for others interested in conducting a SMHPL workshop.

Disclaimer:

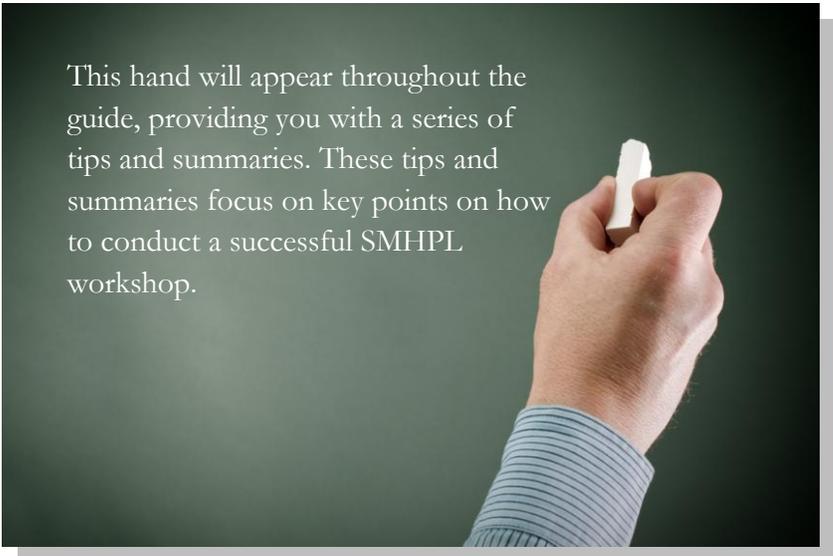
Every effort has been made to ensure the accuracy of the information provided and is correct at the time of printing. The views herein do not necessarily represent the views of the Public Health Agency of Canada.

PUPROSE OF THE GUIDE

This guide is designed to help you successfully facilitate a Senior’s Mental Health Policy Lens (SMHPL) workshop. This guide was developed based on the input and suggestions from those who have conducted SMHPL workshops. It is meant as a *guide*, rather than a list of must-dos. A workshop can contain many things – there is no one path to a successful event. Many of the suggestions you will find here are specific to the SMHPL; others are general tips on how to facilitate a successful workshop. It is our hope that you will find this guide useful to the development of your own SMHPL workshop.

The strength of the Seniors’ Mental Health Policy Lens is that it is both a tool for analysis (to examine in detail a policy, program or practice) as well as a process tool (to generate conversation, new networks and ideas). This guide focuses on how to construct a successful *process* by using the SMHPL as the framework for bringing people together. How to use the SMHPL as an analytical tool is discussed in great detail at: www.seniorspolicyens.ca. Before you read this guide and begin to organize your workshop, it is very important to familiarize yourself with the SMHPL. This guide and the website are companion pieces that will give you a complete understanding of how to use the SMHPL both as an analytical tool and as a process tool. After you have reviewed the Seniors’ Mental Health Policy Lens, you can then begin your preparation for a workshop by reading this guide.

While delivering a successful workshop is not difficult, it does require preparation. After reading the SMHPL, as well as this guide, we hope that you will have all the tools you need.



This hand will appear throughout the guide, providing you with a series of tips and summaries. These tips and summaries focus on key points on how to conduct a successful SMHPL workshop.

DESIGNING YOUR WORKSHOP PURPOSE

This section is designed to help you think through how, and why, you are organizing a SMHPL workshop. The Seniors' Mental Health Policy Lens can be used in a variety of ways, including:

- ❖ To guide the development and review of policies, programs, and practices,
- ❖ To develop a response to an issue or need,
- ❖ To raise awareness about seniors' mental health issues and seniors' inclusion, and
- ❖ As a companion process to existing quality assurance programs, accreditation processes and program reviews.

The Seniors' Mental Health Policy Lens can be used in diverse ways, in a diversity of settings. While you will need to include the background, philosophy and development of the SMHPL in your workshop presentation so that your participants to have a clear idea of the lens, how you do so is largely limited only by your imagination. In the back of this guide, you will find multiple examples of how people interested in seniors' mental health have innovatively applied the lens, both in workshops and more broadly.

Having a concrete idea of how and why you are going to use the lens will help you shape the content of your workshop. Who, and what, do you want to influence? Are you going to be working with high-level policy analysts? Community organizations and advocates? Seniors? A combination of all the above? Remember, anybody can use this lens, so don't assume you only have a narrow audience. You will find that developing a successful workshop requires an idea of who your audience is going to be. Your workshop participants may be from diverse backgrounds and may have diverse experiences and perspectives; what they have in common is their interest in learning how to use SMHPL. Where possible, invite a variety of people interested in the specific issue you are applying the SMHPL to.

Remember, the Seniors' Mental Health Policy Lens has two main strengths: as an *analytical* tool (to examine in detail a specific policy, program or practice), and as a *process* tool (to generate conversation, ideas and connections). As a facilitator, your goal is to create a space where the presenting the SMHPL allows for both strengths to be recognized.

You may need to gather additional information before holding your workshop if you want to know what the issues are for your participants and stakeholders, and to make the findings totally relevant.

As you begin to organize your workshop, a good place to start is by thinking about what your goals are.

1. Do you want to provide people with a general introduction and overview to the SMHPL?
2. Are you interested in using the SMHPL to examine a specific policy, program or practice?
3. Do you want to use the SMHPL to generate ideas and discussion about seniors' mental health and well-being in your community or organizations?

Knowing both your goals and your audience will help ensure for a successful workshop.

QUALITIES OF A GOOD FACILITATOR

As a facilitator, you will be doing a great deal of talking, yet you need to remember that a good facilitator also generates conversation. Your job as a facilitator will require you to wear two hats: as the “expert” in the Seniors’ Mental Health Policy Lens, as well as the “learner” in hearing from your participants. Wearing these two hats can be challenging; reviewing the following qualities of a good facilitator can help provide some helpful tips in negotiating these two roles.

- ❖ Trust in others and their capacities
- ❖ Good listening skills
- ❖ Good presenting skills
- ❖ Confidence without arrogance
- ❖ Ability to create an atmosphere of confidence among participants
- ❖ Respect for the opinion of others
- ❖ Does not impose ideas
- ❖ Flexibility in changing methods and sequences as needed
- ❖ Ability to sense group moods at any given time and adjust the program accordingly
- ❖ Familiarity with the culture, needs, strengths, and limitations of participants, and respect for individual differences
- ❖ Organization: equipment, supplies, time schedule
- ❖ Ability to strike the delicate balance between being directive and non-directive, and to know when each is needed at different points

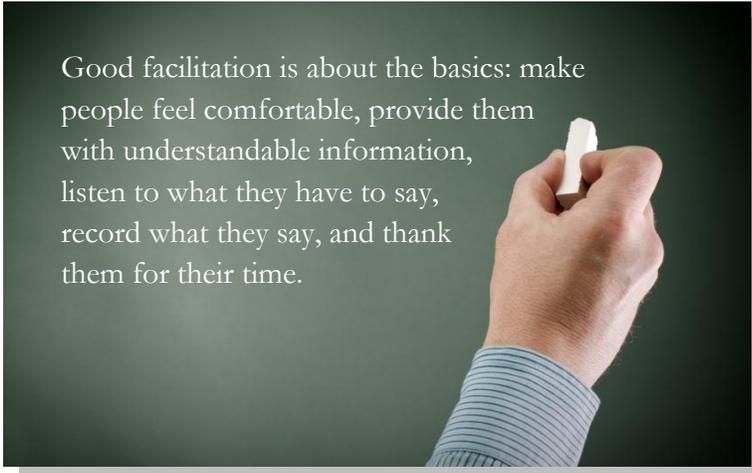
In addition to these qualities, facilitators also ideally have the relevant knowledge and experience – or at least an interest - in seniors’ well-being and mental health. Ensure that you have the necessary knowledge about the policy, program or practice that you are examining. Remember, it is essential that facilitators have a good understanding of all aspects of the Seniors’ Mental Health Policy Lens.

TIPS ON HOW TO BE A GOOD FACILITATOR

This section will provide you with some concrete tips on how to be a successful facilitator.

Greet and encourage participants.

- Greet each participant as they come in, and thank them for attending.
- Let them know that you appreciate their attendance, and that you're looking forward to hearing their about their experiences and perspectives.
- At the end of the workshop, thank participants for their time and input.



Good facilitation is about the basics: make people feel comfortable, provide them with understandable information, listen to what they have to say, record what they say, and thank them for their time.

Make everyone feel heard.

- Make eye contact when speaking to participants.
- Respond positively to each person's specific comments. Even if you do not agree with the perspective, find a common ground by connecting the comment to the shared values of the participants and the SMHPL. You can also tell participants you will return to their comments at a later date – and make sure you do.

Create a comfortable environment.

- Show your personality, so people feel like they know you.
- Respond to initial introductions by using them as a springboard for further discussion.
- Organize the meeting space for maximum interaction – don't let people sit too far away from each other, or in areas where they may have difficulties hearing/seeing the presentation material.

Foster communication between and among participants.

- Phrase responses to encourage further responses from participants, and draw connections between participants' comments.
- Avoid "over-facilitating", i.e., don't answer every question and settle every point so there is nothing for anyone else to say. If you respond to one question, push the discussion forward by raising another.
- Use plain language wherever possible.

Model desired type of interactions.

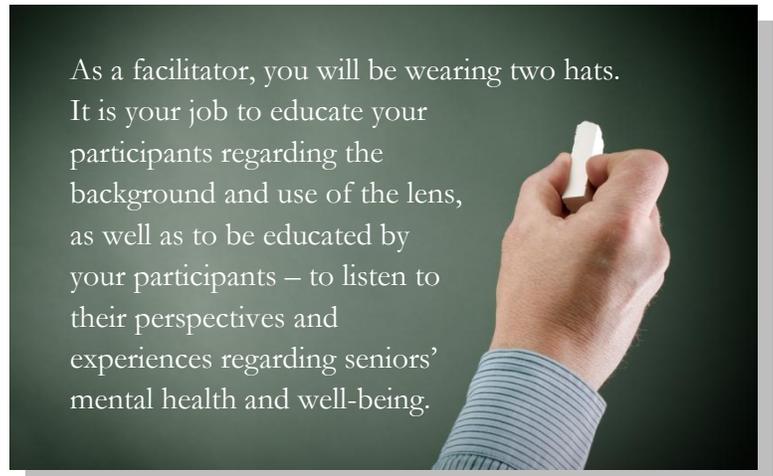
- Being respectful, inclusive, and making connections between participants' comments will model this type of discussion for the participants as well.

Keep the discussions on track.

- Rein in long digressions with a gentle redirection. For example, you can do this by thanking them for their perspective, then connecting it to a point someone else has raised, or by connecting it to information further in the workshop.

Push people forward on the topic.

- Act as a magnifying glass, reflecting the energy back towards a central focal point.
- Be creative with getting people's attention.



EQUIPMENT REQUIREMENTS

There will be basic equipment needs for your workshop. While each workshop is different, from past experience we have found that the following tools will help you organize your workshop efficiently.

1. Copies of the Seniors' Mental Health Policy Lens (or at minimum, the lens questions)

We have found that having some printed SMHPL material helps workshop participants organize their ideas and questions. You can download and print off SMHPL at: www.seniorspolicyens.ca If you prefer, you can choose to only print off the main questions of SMHPL. Some of your participants may have vision or hearing problems, making it difficult for them to follow a powerpoint presentation. Therefore, at a minimum, participants should have access to a paper copy of the SMHPL questions, to help guide them during the workshop. A printed copy of the questions also allows them to take the information away with them without necessarily having to access the internet.

2. Access to the Seniors' Mental Health Policy Lens Website (recommended)

Depending on where you hold your workshop, it may or may not be possible to connect to the Internet. If at all possible, try to host your workshop in an area you can connect to the web; participants respond well to having a chance to work through the lens questions on-line. Working through the questions online works well whether or not you have a specific policy, program or

practice to examine. Past experience has shown that participants “get” how to use the lens more quickly if they are able to use the website. The full printed SMHPL document can be a bit intimidating for some people due to the amount of information presented. The SMHPL website allows participants to click on the links for more information, but only if they are interested, allowing for the flow of information to be controlled by the participant. However, we recognize that connecting to the Internet may not be possible for many facilitators, which is why you should have at least the basic aspects of SMHPL printed for participants.

3. Laptop with power point presentation

You will need to develop a presentation for your workshop. Increasingly, the most common form of presentation is a powerpoint – a user-generated computer slideshow. A laptop is indispensable for running a successful workshop; from your computer you will run your presentation, as well as connect to the SMHPL website. Later in this guide we will go into more detail about what your presentation may contain. For examples of how others have presented the SMHPL, please see: www.seniorsmentalhealth.ca/Best%20Practices.htm

4. Projector with laptop connection

A successful workshop requires that you are able to enlarge and project text and images for your participants. Having a projector will help focus both you and your participants on the key aspects of the SMHPL that you are presenting. If you do not have access to a projector with a laptop connection, you can instead use an overhead projector. Remember, you will also need a large blank wall or cloth for which to project your presentation on to.

5. Paper and pens

The goal of your workshop is not only to generate new ideas and understandings about seniors’ mental health and well-being, but also to have them recorded. Your participants will need paper and writing tools in order to do group work and to take notes – in short, to remember what they feel is important. You can then ask participants to share from their notes.

6. Flip chart and markers

There are many ways to record the ideas and information that your participants share with you. However, using a flip chart and large felt markers is one of the best; writing down key discussion points and responses on a flip chart allows both the participants and facilitators to see what has been discussed and recorded. Additionally, by writing down only the key ideas, it keeps the focus on the participants, rather than having your head

Equipment Requirements:

1. Copies of SMHPL
2. Access to SMHPL website
3. Laptop with powerpoint
4. Projector with laptop connection
5. Paper and pens
6. Flip chart and markers
7. Name tags

down madly trying to take notes. You can then take the information from the flip charts as the basis for your report about the workshop.

7. Name tags (recommended)

The chances are that you will not know all your participants', and many of the participants may not know each other either. Having name tags allows you to use a person's name, and allows for directed comments. Name tags also increases the comfort of the participants and can increase familiarity. Alternatively, you can have name 'signs' made from a folded piece of paper in front of each participant's seat that they can fill out.

PREPARING FOR A WORKSHOP

This section is designed to provide concrete suggestions on how to prepare for your workshop – from whom to invite, what information to include in your invitations, basic organization of your workshop, and what to include in your presentation.

Whom to invite

The first aspect you want to think about is who are you going to invite to your workshop? As discussed previously, you need to know your goals for having a SMHPL workshop. Once you know your goal (policy, program or practice review, to develop a response to an issue, or to raise awareness and generate ideas about seniors mental health), you should have an idea of whom you would like your audience to be. Perhaps you would like to invite a broad section of the community, or you may prefer to target one profession or organization. For example, if you are focusing on community organizations or seniors' advocates, you may want to use a specific example of a program or issue that they are familiar with. If you are meeting primarily with policy analysts, educators or others who have a strong background in analyzing policies, programs or practices, you may choose to focus on a higher level of discussion, such as government policy frameworks. You may choose to invite people that you already know, or have a working relationship with. You may choose to invite people who you do not know, or have only a slight knowledge of. Either way, who you choose to invite will determine how you organize and present a SMHPL workshop.

Sending invitations

Chances are, you will be sending invitations to people you may know only slightly, or not at all. The people that you invite need to know what the purpose of the workshop is, why they in particular are being invited to participate, and *why*

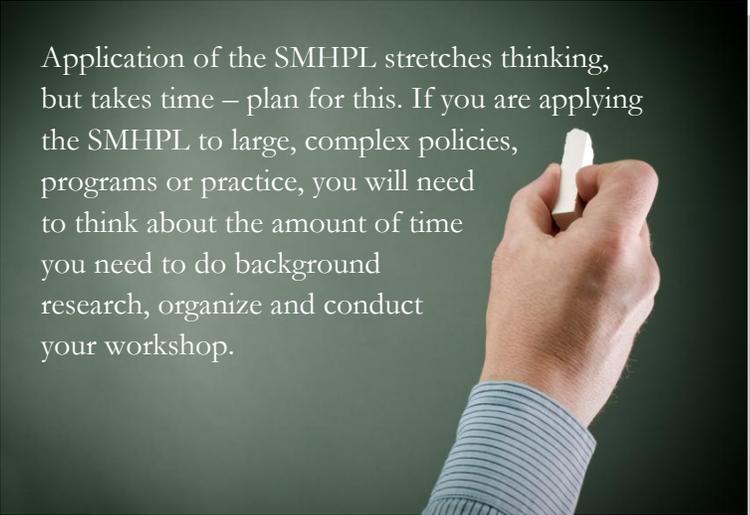


When deciding who to involve, think broadly but also be strategic – who do you want to influence and develop new partnerships with?

Obtain the commitment of leaders before applying the SMHPL; they will be useful in navigating complex levels of bureaucracy.

attending the workshop will be useful for them. There are many ways you can form your invitation; for organizations an email or phone call may suffice – for others, an informational brochure about the SMHPL with an accompanying letter works best. Regardless, the following pieces of information should be in your invitation:

- ❖ What the SMHPL is (and provide the web address in case they want more information)
- ❖ The purpose, and goals, of the workshop (including, if applicable, the specific policy, program or issue being reviewed)
- ❖ Why they in particular are invited (why is it important that they come?)
- ❖ What they are expected to do (share their experience, ideas, etc.)
- ❖ What outcome is expected from their participation (analysis of policy, networking, generation of new ideas, etc.)
- ❖ Where the workshop will be, date of workshop, and duration of workshop
- ❖ Contact information



Application of the SMHPL stretches thinking, but takes time – plan for this. If you are applying the SMHPL to large, complex policies, programs or practice, you will need to think about the amount of time you need to do background research, organize and conduct your workshop.

WORKSHOP EXAMPLES:

In Prince George, B.C., The Council of Seniors created a series of workshops for community organizations, academics, and front-line service workers. They provided in-depth information on the background of SMHPL, as well as using SMHPL to evaluate several of their own programs.

In Cumberland, B.C., an invitational luncheon was held for a diversity of community members who were interested in seniors' mental health. SMHPL was used to generate concrete ideas about how to develop seniors' inclusion in community development.

In Newfoundland and Labrador, a SMHPL workshop was held to train regional recreation directors on the importance of including mental health as a focus in creating and sustaining recreation programs for older adults.

For further information on these workshops, please see the Case Studies at the back of this guide.

If you are inviting people who you don't know well, or are working with a large, complex organization, you may face some challenges in achieving "buy in" about the usefulness of the SMHPL. For a discussion of how to address some of these challenges, please see the section of this guide entitled "Selling the SMHPL". Generally, people will be most interested in attending your workshop if the goals that you have identified are ones that are close to your audience's interests – remember this as you write your invitations.

Logistics

Presenting a successful workshop requires attention to detail. Ask yourself the following questions:

- ❖ **Who will be the note taker?** A workshop "works" best if there are two facilitators – one to run the workshop, the other to take notes and provide any background help.
- ❖ **What time of day should the workshop take place?** Daytime may work best for some organizations and individuals; others can only participate in the evening.
- ❖ **How long should the workshop be?** Again, think back to your goals. Will you be able to do it in an hour and a half? Or do you need three hours? How much time will your participants be willing to spend? Based on our experiences, two hours is usually enough time to present the basics and work through a quick case study – three hours if you want to generate intensive discussion and ideas.
- ❖ **How many people should you invite?** The general rule of a successful workshop is that there are between eight and twelve participants. If you have more than this, it can be difficult to have everyone speak; any less and it can be challenging getting conversation started or sustained. Remember that not everyone you invite will be able to attend, so you should invite a few more people than you think will show up.
- ❖ **Where will you hold the workshop?** The space you choose for your workshop is very important. If it is too big, your participants may not feel comfortable or be able to participate properly; the same goes if the space is too small, too loud, lacks proper lighting or privacy. The workshop site should have plenty of space for people to be able to spread out in groups and work without disturbing other groups. Auditorium settings are not advisable, however, because of the participatory nature of the workshop. However, if this is your only alternative, try to keep the group to one section so that everyone still feels connected if they are doing separate exercises. Think about the appropriate space to hold your workshop and make sure it is available.
- ❖ **Know the policy, program or practice that you are going to apply SMHPL to.** Knowing what policy, program or practice you will be using as your example will help you better streamline your presentation and keep you focused. Pick an example that is relevant to your audience; this will keep them engaged and help them better understand the relevance of using the SMHPL. If you are interested in using the SMHPL to generate discussion, ideas and networks, make sure that you know what topic you want to discuss as well as the "boundaries" of it – so that you can keep the workshop conversations on track.

- ❖ **Providing refreshments.** You should provide some basic refreshments for your participants. If you are holding your workshop during the day, think about providing a simple lunch; if your workshop is in the evening, coffee and baked goods may suffice.

Creating Your Presentation

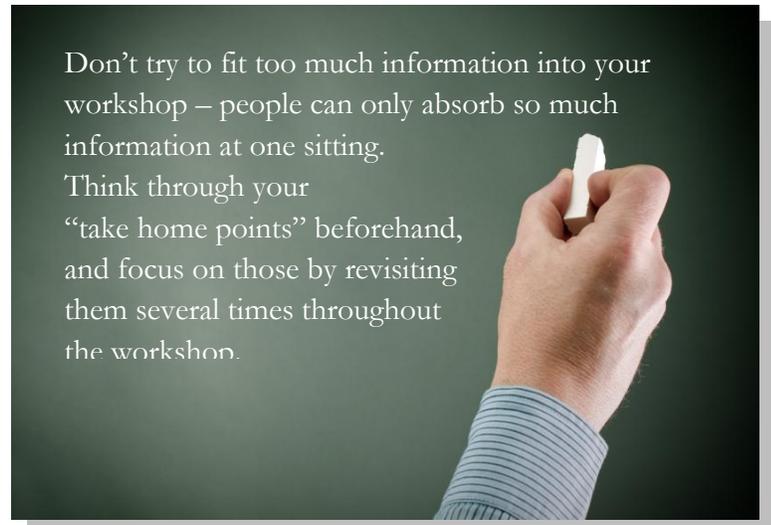
How you design your presentation will depend on the following things:

- ❖ Who is your audience
- ❖ The goals of your workshop
- ❖ The amount of time you have

Based on our collective experience, there are three aspects that you should include in your workshop: 1) the background of how the Seniors' Mental Health Policy Lens was developed, 2) an overview of the lens, and if time permits, 3) an application of SMHPL. The following template is a suggestion only; feel free to modify, add or omit based on your individual needs.

- ❖ Introduction & purpose of workshop
- ❖ The process & benefits of participating in workshop
- ❖ Defining mental health (begin with asking your participants to define this concept to generate conversation)
- ❖ What promotes good mental health? (ask your participants before you define it)
- ❖ What challenges good mental health? (ask you participants before you define it)
- ❖ What is the SMHPL?
- ❖ Benefits of using the SMHPL
- ❖ 12 areas of SMHPL inquiry
- ❖ How the SMHPL can be used
- ❖ The SMHPL (use website if possible)
- ❖ Applying the SMHPL (optional)

You can find specific information on each of these sections in the Seniors' Mental Health Policy Lens. When you are designing your presentation, remember that there are two goals to your workshop: 1) educate your audience regarding the basics and use of the SMHPL, and 2) learn about your audiences' experiences and ideas about seniors' mental health and well-being generated through them applying the SMHPL. Make sure that you include content that will generate conversation, and leave appropriate time and space for those discussions.



The strength of the Seniors' Mental Health Policy Lens is that it is both a tool for analysis as well as a process tool. While you should highlight both of these aspects in your presentation, given your time constraints, you may choose to focus primarily on the analysis aspect through your examination of a specific policy, program or practice. Alternatively, your goal can be to generate process - a general introduction to the lens to generate ideas without necessarily working through a specific example. You can also reference how it has been used through a review of case studies (included at the back of this guide, as well as on the website).

RUNNING YOUR WORKSHOP

This section outlines some of the necessary components for conducting a successful SMHPL workshop.

- ❖ *Have an agenda.* Having an agenda will help both you and your participants stay on track. You will have a great deal of information to discuss; an agenda will remind everyone of the key points to be covered. However, you will also need to be flexible; sometimes conversations go in unexpected, yet productive, directions. As the facilitator, it is up to you to decide if you would like to pursue a new line of thinking and ideas rather than stick to your original agenda.
- ❖ *Provide an informed overview of the reason for the workshop.* To engage your audience, and to be effective in applying the SMHPL, you need to know your topic, as well as the population of seniors who are, or will be, affected by the policy, program or practice you are examining. If dealing with a specific policy or population, provide an overview and state what you're most interested in exploring. This will provide a ground for a shared understanding of the topic, population, or policy being addressed.
- ❖ *Ask open-ended questions.* This means asking questions about the areas of the SMHPL and letting your participants answer them based on their own understandings and experiences. While there are many definitions and explanations from the SMHPL – which are important for everyone to understand – asking workshop participants for their understandings before you explain the concept or definition can generate conversation and ideas, and will let your participants know that their thoughts are important. Asking open-ended questions can also help de-stigmatize concepts such as mental health. These questions will give you better information as to the perspectives and background of your participants. Additionally, you may be able to build on the answers to these questions later in your workshop.
- ❖ *Use plain language.* Keep in mind that you may have expertise – particularly about the SMHPL – that is not shared by your participants. Using plain language will ensure that your participants do not feel intimidated or overwhelmed.
- ❖ *Focus on the SMHPL questions and philosophy.* You want to spend the majority of the time having your participants working with the SMHPL, rather than just explaining it to them.

Also, by focusing on the areas of SMHPL inquiry, you will keep the workshop focused on the seniors who will be affected by the policy, program or practice rather than on personal agendas. Remember to emphasize that the SMHPL process reinforces that all seniors are entitled to quality care, maximum participation in issues that affect them, and a high quality of life, regardless of impairment.

- ❖ *Emphasize the flexibility of the SMHPL.* The SMHPL is both an analytical and process tool. Given your workshop audience, you may find that emphasis will be directed to one of these aspects. The SMHPL is a very versatile tool, and participants may choose to concentrate on one topic of analytic inquiry, or use the SMHPL primarily as a process for structured conversation. While this can work well within the confines of a workshop, remember that a successful “take home message” about the usefulness of the SMHPL will require you to emphasize all of the SMHPL aspects. There is really no “wrong” way to use the SMHPL, as long as participants understand that it is a multi-purpose tool, and can be used in a diversity of settings for many differing outcomes.
- ❖ *Make the SMHPL practical.* One way past SMHPL facilitators have been most successful in their workshops is by doing group work. How you choose to organize group work is limited only by your imagination. At the back of this guide, there are some concrete examples of group work from past workshop facilitators. Remember, you want to spend most of the time having participants work “hands on” applying the lens, rather than you merely explaining it.
- ❖ *Be positive.* It doesn’t matter how you are using the SMHPL – for advocacy, to generate ideas, or to analyze a policy, program or practice – be sure to identify and document what is being done right so the process does not seem negative or overwhelming. The goal of introducing and using the SMHPL is to encourage people to engage in positive social change regarding seniors’ inclusion and seniors’ mental health.
- ❖ *Be creative.* While the SMHPL takes on the perspective of an “ideal world”, this perspective helps give openness and depth to discussions and analysis. Don’t be afraid to generate “wish lists” along with more concrete possibilities. Recommendations and action plans can then be made for future funding and resource opportunities.
- ❖ *Be specific.* One of your main goals for putting together the workshop is to document the discussions, new ideas and connections that your participants make during this time. Ask your participants to be as specific as possible about concerns, challenges, desires and solutions. All of these points should be recorded and discussed as fully as time allows. These points can then form the body of your follow-up report and action plans.
- ❖ *Be aware of your own, and others’ possible biases.* We all bring conscious and unconscious biases to the table; it your goal as a facilitator to think clearly about your own biases and how you may deal with the biases of others. Create a space where people can feel safe both to express their

honest ideas and opinions as well providing boundaries for respect. If you feel that someone's biases are becoming problematic, rather than being confrontational, engage and re-direct – ground your conversation respectful listening and direct the discussion to the shared values emerging from the SMHPL.

- ❖ *Be open to the unexpected.* Keep in mind that what you are the most interested in discussing may not necessarily be what your participants are most interested in discussing. A successful workshop is a creation between the facilitator and participants, and you will need to keep an open mind about what the outcomes are for the workshop. You may find unexpected and useful information. People may interpret the SMHPL questions in various ways; use this difference to develop an understanding of diverse perspectives.
- ❖ *Be aware of your participants' energy levels.* You are imparting a lot of information; make sure that you do not overwhelm them. All workshops will have energy ebbs and flows; by keeping an eye on “workshop fatigue” you will better know if you need to move on to another topic area or to give your participants a break.
- ❖ *Summarizing and debriefing.* Give yourself enough time so that everyone can contribute their key ideas on the topic being discussed, as well as their thoughts about participating in the workshop. The goal here is to record the specific ideas and discussion points from the workshop – these will form the basis of your follow-up report and action plan. Ask your participants what worked best for them, and what they found challenging – you can incorporate these into your report. This information will give you ideas about how to modify future workshops and discussions on your topic.

Important components of a successful workshop:

1. Have an agenda
2. Provide an informed overview for the reason of the workshop
3. Ask open-ended questions
4. Use plain language
5. Focus on the SMHPL questions
6. Emphasize the flexibility of the SMHPL
7. Make the SMHPL practical
8. Be positive
9. Be creative
10. Be specific
10. Be aware of your own, and others', biases
11. Be open to the unexpected
12. Be aware of your participants' energy levels
13. Summarizing and Debriefing



Documenting the Workshop Outcome & Follow-up after Application

Documenting the outcome of your workshop is as important as organizing and conducting the workshop. The record of the discussion and ideas generated from the SMHPL workshop will form the backbone of your “outcomes” document, and any action plan you create. The ultimate goal of conducting a SMHPL workshop is to change policy, programs and practices that impact seniors’ mental health and to champion seniors’ inclusion in their development and evaluation. However, change cannot happen without documentation and a commitment to follow-up. Here are a series of tips generated from those who have been through the process; past facilitators have found these suggestions provided them a solid format for documenting their workshop outcomes.

- ❖ How you choose to design and distribute your report of the SMHPL workshop outcome is up to you. However, you need to remember who your audience is when thinking through how much detail you include, how you format the report, and how you will distribute it. Think through what were the most important points of the presentation, what were the main discussion points, and what follow-up is needed. At the most basic, a report should include:
 - The purpose of the workshop (including a short summary of why the SMHPL was used)
 - The topic of the workshop (including a short summary of the topic “issue”, i.e. why was it important to discuss?)
 - Summary of participants’ discussion and key ideas
 - An overview of how using the SMHPL changed perceptions, generated ideas, and the lessons learned from conducting your workshop
 - Intended follow-up

- ❖ After the workshop discussion, you may need further information about the policy, program or practice. Make sure you create a timeline for obtaining this information, and discuss who will be responsible for taking on this research. Ensure that the timelines and identified responsibilities are followed up on. Create an accountability mechanism for ensuring that those timelines and responsibilities are met.

- ❖ You may find that the issues raised by using the SMHPL require increased staffing, education and other resources that your organization or community may not currently have. This is part of the SMHPL process - it highlights the importance of advocacy for appropriate and adequate resources for seniors’ mental health and well-being. You can build this advocacy into your over-all follow-up process – make your need for further resources an action item.

- ❖ Make your report relevant to the population you are serving. The results of the SMHPL application to the policy, program or practice needs to be communicated to affected seniors, as well as other stakeholders. Organize your report so that it is easy to read, and contains relevant information for other people to use and learn from.

CHECK-LIST SUMMARY FOR SMHPL WORKSHOP

1. Read through the SMHPL document, located at: www.seniorspolicyens.ca
2. Think through which topic, policy, program or practice you want to apply the SMHPL to.
3. Gather any necessary background information on the topic, policy, program or practice to generate conversation points or specific inquiry.
4. Think through what your goals of the workshop are.
5. Think through whom you want your audience to be.
6. Review the qualities of a good facilitator, and what is expected of a facilitator during the workshop.
7. Check that you have all the equipment required to conduct your workshop.
8. Design the content of your workshop, using core components of the SMHPL. If desired, choose an exercise template from this guide for your SMHPL application.
9. Send out invitations and background SMHPL information.
10. Create an agenda for your workshop.
11. Make sure you take notes of key points of discussion, key ideas and points of follow-up.
12. Create a report discussing these above points, and any follow-up, in a format that others can easily understand.

“SELLING THE SMHPL”

Why should you use the SMHPL?

Hopefully, by this point you have a very good idea of the strengths and use of the SMHPL, and how it has been used in a diversity of settings; from large complex medical institutions and highly-regulated government agencies to small, informal community organizations. In some of these environments, you may find some resistance to the idea of using the SMHPL. People may feel that they already have adequate tools, that they already “know” the issues, or have feelings of ownership and feel threatened by outside help. The following reasons for using the SMHPL may help you provide a context for those who do not have familiarity with the lens, and to gain entry to those with influence. Using the SMHPL:

- ❖ Has been endorsed by the Canadian Mental Health Commission
- ❖ Has been evaluated as a “best practice”
- ❖ Is a way to engage with The World Health Organizations’ Healthy-Aging Communities Initiatives
- ❖ Provides a structured process for generating discussion and ideas
- ❖ Can highlight what an organization is doing right
- ❖ Adds value to any policy, program or practice, without increasing cost
- ❖ Reflects a commitment to include seniors at any point of a policy, program or practice development, implementation or evaluation
- ❖ Provides an opportunity to be recognized as a community, provincial and federal leader in seniors’ well-being and mental health
- ❖ Is a non-threatening tool that facilitates conversations from a diversity of perspectives
- ❖ A practical way to support seniors well-being and mental health
- ❖ Provides a sum of expertise from a diversity of disciplines, including: population health, mental health promotion, and healthy aging policy
- ❖ Promotes a society that is inclusive of, and values, seniors

You may also find these common concerns in your attempts to apply the SMHPL.

“We already know the issues”

- ❖ Organizations have often not gone through a structured documentation process. Using the SMHPL allows for a documentation process that allows for priority setting, further discussions, and funding initiatives.
- ❖ We all sometimes think we know all there is to know; using the SMHPL as a process tool of questioning these assumptions shows that learning is an on-going process from a diversity of perspectives.

“We don’t have resources to act on the findings”

- ❖ Outcomes are important, but even if the findings from applying the SMHPL cannot be acted on right away, the process and documentation will exist to justify and prioritize seniors’ well-being and mental health in future initiatives.
- ❖ The process of applying the SMHPL allows participants to consider questions from perspectives they may not have considered previously. This sensitization itself is a valuable contribution to any policy, practice or program.

“It’s too much for us to take on”

- ❖ Using the SMHPL is a straightforward process, and allows for self-defined prioritization of areas of interest. This gives control of application to those who use it.
- ❖ If you have the ability, do a bit of background work to find points of relevance between the policy, program or practice and specific areas of the SMHPL analysis. Focus on these sections when you talk to your organization of interest.

“What if we don’t like the outcome?”

- ❖ Application of the SMHPL can prioritize the process aspect, rather than the analysis. The documentation resulting from applying the SMHPL will highlight both challenges and successes of the organization. However, the real success is that the organization participated in the process of the SMHPL – the organization has thought through, in a meaningful way, how to prioritize seniors’ inclusion, well-being and mental health concerns.
- ❖ “Ownership” of any documentation rests with the organization that undertakes the SMHPL application process.
- ❖ Participating in the SMHPL process will demonstrate a commitment to seniors’ well-being, and show leadership on a community, provincial and federal level.

SMHPL EXERCISE TEMPLATES

There are many benefits of engaging in group work within a SMHPL workshop.

- ❖ Group work allows participants to engage with the SMHPL in a practical manner.
- ❖ Group work can generate ideas and discussion that are specific to the group and topic.
- ❖ Group work can generate a diversity of perspectives and ideas in a short time.
- ❖ Group work allows participants to work on issues or areas they are most interested in.

If you choose to include group work in your workshop, you want to encourage your participants to discuss what the “issues” are on their topic, as well as to provide practical ideas and solutions to these issues. Group work should also focus on resources needed to address the policy, practice, program, or issue; including what – if any – further information is needed.

How you choose to organize your group work is up to you; below are only two possible examples of how group work has been organized in previous SMHPL workshops.

Using existing case studies

The case studies included in this guide are useful in a workshop setting where you are pressed for time. Once you have worked through the background and format of your SMHPL workshop, you can present one – or several – of these case studies to explore how it has been used in a diversity of settings. If you only have the time to do a short amount of group work, the following instructions may be useful for generating conversation:

- ❖ Have your participants break into groups of two or three to discuss the case study (give participants a paper copy of the study being examined).
- ❖ Based on the case study, ask them to generate ideas about how they might use the SMHPL in a similar setting (based on their area of interest).
- ❖ Ask them to discuss the value of using the SMHPL in their own area of interest.

Example:

Using the case study of community planning in Cumberland, B.C., one set of workshop participants discussed the possibility of using the SMHPL in thier community where seniors are concerned about personal safety after dark. They felt that using the SMHPL would ensure a focus on seniors’ participation and perspectives in developing community infrastructure such as much needed lighting, sidewalk repair and transportation.

Applying the SMHPL categories to an issue, policy, program or practice

Applying the SMHPL to a specific issue or policy in your workshop will help your participants better understand the many uses of the SMHPL. The strength of this approach is that it allows for directed and in-depth discussions. For this reason, if you have the ability to apply the SMHPL in your workshop, you will find that your participants generate a great deal of engaged information and

ideas. There are multiple possible approaches for applying the SMHPL in a workshop. Possibilities include:

- ❖ Providing the policy, issue or topic;
- ❖ Participants can choose their own policy, topic or issue; or
- ❖ Providing the “framework” for discussion, leaving the specific issue to be discussed up to participants.

By providing a specific policy or issue, all of your participants will be working on the same topic, which may work best if you want a focused, in-depth response on a single issue such as a policy. If you leave it up to participants to choose their own policy or topic, you may generate a breadth of information on a diversity of topics. This choice works well if you would like a broad overview and a diversity of perspectives regarding what your participants see as important to seniors’ mental health, for example within a specific community or seniors’ organization. The third option is explored more fully below.

Example:

One SMHPL workshop facilitator was interested in several issues impacting seniors’ well-being who live in a long-term residential care facility. By speaking with several administrators and front-line care providers, as well as residents of the home, she was able to generate key areas of concerns that people felt were the most pressing regarding seniors’ mental health and well-being. She decided to facilitate a SMHPL workshop based on these concerns. During the workshop, she shared the list of issues that were generated and asked people to break into small groups based on their particular interest in discussing an issue. The groups were then asked to match their issue with one of the areas of the SMHPL inquiry (such as “Inclusion”, “Transitions and Challenges”, or “Dignity and Respect”) to further explore their topic. They were asked to note what the main issues were for that specific topic, and to use the questions from their chosen SMHPL category to generate some possible solutions. One group of health care professional attending this workshop chose the issue of residents with challenging behaviours and examined it through the SMHPL category of “Safety”. They felt the main issues were: 1) clients with dementia often have difficult and challenging behaviours that leave them further isolated, 2) any outburst by a client was “marked” in their chart and they were then labelled as “problematic”, 3) the staff felt pressure to discharge challenging residents, and 4) the need to ensure the safety of all their residents, including those with challenging behaviours. In their generation of possible solutions, this group decided that they would forward the development of a guideline to ensure that “least intrusive” interventions (e.g. modifying the social and physical environment) were to be implemented prior to consideration of relocation. At the same time, they would advocate for measures to be put into place for the ongoing assessment of disturbance to the other residents and staff, and that this information would be factored into any decision making.

CASE STUDY #1

The Seniors Mental Health Policy Lens and Community Recreation in Newfoundland & Labrador

About Recreation Newfoundland & Labrador

Recreation Newfoundland and Labrador (RNL) is dedicated to improving the delivery of community recreation programs and services. The Seniors Mental Health Policy Lens (SMHPL) pilot project targeted the new Regional Recreation Director Program with a view to better responding to the needs of older adults living in rural areas of the province.

Project outcomes:

- Offer training and orientation to SMHPL for Regional Recreation Directors;
- Test SMHPL with focus groups in at least one rural region;
- Review provincial strategies for recreation, wellness, poverty reduction and healthy aging from a seniors' perspective;
- Develop a practical resource package/training guide for seniors mental health
- Promotion for community recreation practitioners – including the SMHPL Toolkit, health promotion practices and community development principles;
- Promote SMHPL at RNL Annual Meeting 2010.

Introducing and Applying “The Lens”

A total of fourteen presentations were conducted with professionals working with seniors, health promotion, recreation, or mental health staff. One SMHPL orientation was provided to staff and volunteers of the four the Regional Recreation Committees. A 3 hour community workshop was offered through the Eastport Peninsula Recreation Committee with seven volunteers from four community groups participating. The workshop agenda included: background and overview of SMHPL; provincial and local seniors demographics; challenges facing seniors; mental health promotion and the role of community recreation; a practical application of the Lens using a local group; and, wrap up discussion and comments.

Did applying SMHPL “change” recreation programming?

Awareness and sensitivity – Discussion and application of the SMHPL did raise awareness and sensitivity of challenges facing seniors and seniors' mental health. *Partnerships* – The workshop begins to foster local collaboration. The other meetings and presentations help build network and prospective partners for RNL. *Deliverables* – A one page flyer and a power point presentation were created to introduce SMHPL. A community recreation guide to seniors' mental health promotion is in the works and will serve as a companion to SMHPL (funding pending).

Lessons learned

1. Find ways to communicate mental health as a positive concept. People are interested, but apprehensive, which is likely related to the stigma associated with mental illness.
2. It takes time to build relationships, but it pays off. Anticipate travel time, conflicting schedules of staff and volunteers, limited resources, meeting spaces, etc.
3. Applying the Lens in a broad community setting is ambitious. Small groups (or pairs) applying one or two questions may be more effective.
4. A full day training session is needed for those who will use the Lens.

5. Incorporate the website as part of presentations and meetings.
6. Need to deal with terminology and interpret questions from a community recreation program perspective.

CASE STUDY #2: The Seniors Mental Health Policy Lens and the B.C. The Age-Friendly Business Guide

About The Age-Friendly Business Guide

The Age-Friendly Business Guide is an initiative of the B.C. Age-Friendly Communities Initiative. The goal of creating the brochure was to:

- Provide information to businesses about how to serve older consumers effectively
- Show communities how to encourage local businesses to be age-friendly
- Help consumers be aware of what they can expect from a store, service or agency that wishes to attract their business.

The goals of applying the Seniors' Mental Health Policy Lens were: 1) to support the process and development of the guide, 2) to evaluate the process and development of the guide, and 3) to assess the relevance of using the SMHPL in the process, development and implementation of the guide. Seniors' input was sought in designing both the form and the content of the Guide, and an extensive array of seniors' organizations participated through focus groups, document review and individual commentary.

Project outcomes:

- Two interviews with the consulting lead, before and after the development of the Age-Friendly Business Guide to assess the usefulness of applying the SMHPL to increase inclusion of seniors' issues, participation and concerns.

Introducing and Applying "The Lens"

While the developers of the Guide may benefit their project, there was some initial concern the SMHPL. The reasons for the reticence included: 1) the developers have extensive expertise in the field of seniors' health and research, and 2) at initial contact the Guide was not yet even in draft stage. Through several initial phone conversations, it was decided to take specific questions from the SMHPL and to "talk through" them in an informal discussion about the process and production of the Guide. Twelve questions were taken from the SMHPL, and included: process factors, challenges, accessibility, relationships, participation, risk management, and evidence-based categories.

Did applying SMHPL "change" The Senior-Friendly Business Guide?

The lead developer found the SMHPL application useful in three concrete ways:

- As a "reminder" about the importance of seniors' inclusion in the review process
- Conceptually through broadening the audience of the guide to include seniors – not just businesses
- In long-term planning for the implementation phase of the Guide.

Currently, while there are no concrete plans for “rolling out” the document, the developers expressed keen interest in using the SMHPL in designing future implementations of the Guide. While they were not able to address the first two points raised by using the SMHPL (due to time and financial constraints), the developers felt that the SMHPL applied to any implementation plans for the Guide would strengthen the uptake and use of the Guide, as well as providing concrete direction for specific piloting projects.

Lessons learned

- The need to be flexible in how you present, market, and use the SMHPL.
- It’s important to have knowledge of the policy, program or practice that you are applying the SMHPL to.
- Applying the SMHPL is useful at any point of conceptualizing, developing or implementing a process designed to increase seniors’ well-being.
- Even “experts” on seniors’ issues find the SMHPL useful.
- Desires for immediate large-scale changes from applying the SMHPL may need to take a backseat to longer-term advocacy and awareness raising.

CASE STUDY #3:

The Seniors Mental Health Policy Lens and the Prince George Council of Seniors

About the Council of Seniors

Prince George Council of Seniors (PGCOS) is an umbrella seniors’ organization whose membership includes five seniors’ activity centres, numerous retiree organizations and a number of individuals not affiliated with either. PGCOS runs a storefront resource and referral centre and facilitates practical services for seniors such as Meals on Wheels, volunteer Outreach visitors, and Beginners Computer Classes. PGCOS is often called on to “find a senior” for community meetings, committees and panels. In the face of this tokenism, we believe the SMHPL provides a practical and versatile tool for evaluating the effectiveness of policies and services for seniors.

Project outcomes:

- A series of SMHPL workshops to community organizations and front-line service providers
- Evaluation of the PGCOS Outreach Program using the SMHPL
- Seniors’ using our weekly program “Wellness Wednesday Drop-in” used the SMHPL to evaluate accessibility to the program
- Use of the SMHPL to develop PGCOS policies and procedures for “The Seniors’ Peer Support Program”, to be launched in May, 2010.

Introducing and Applying “The Lens”

Originally, we planned to utilize positive existing collaborative partnerships with the City of Prince George and Northern Health Authority service and program managers to introduce the SMHPL. This did not pan out as key contact people were away on vacation and project timeline was too short to wait for their return. Subsequently, we opted to demonstrate this lens to as many community organizations as possible, and sent workshop invitations to local organizations and front-line service

providers, as well as local organizations belonging to Volunteer Prince George. We also did a presentation at the University of Northern BC as part of “The Many Faces of Health Research”.

In our three-part SMHPL workshops, we gave an overview of the lens background and development, of our own pilot project and other pilot projects across Canada, and then either took a closer look at a specific portion of the lens / website or did a group analysis of a specific local program or service.

Did applying SMHPL “change” the Council?

Workshop participants clearly became aware of the SMHPL’s potential, and especially appreciated both user-friendliness of the on-line tool and the way questions opened up valuable discussions. We appreciated the way our workshops appeared to ripple outward as many participants wore multiple community hats. Seniors’ who evaluated our Wellness Wednesday Drop-in Program told us that when the weather turns icy, the slight incline at the front door makes it difficult for them to access the building. We have since modified the entryway. We will continue to promote the use of this lens locally, and use it ourselves as we develop new PGCOS programs. We also believe the SMHPL is a versatile tool that can be readily tailored to any specific population in danger of being “unheard”, not just seniors.

Lessons learned

- Let participants know that the SMHPL questions are not necessarily “black and white”. The yes/no format may confuse some participants who want to answer in a more nuanced way. Encourage them to use the “notes” section in each category to provide a more detailed answer.
- When using the SMHPL with community members, you need to use plain language. Explain any difficult or abstract concept.

CASE STUDY #4:

The Seniors Mental Health Policy Lens and Community Planning in Cumberland, B.C.

About Community Planning in Cumberland

In the fall and winter of 2009, the Seniors’ Mental Health Policy Lens (SMHPL) was applied to community development issues in the Village of Cumberland, located on Vancouver Island. The SMHPL was used to analyze Cumberland’s Official Community Plan (OCP), and, through a series of interviews and a 3-hour workshop, generated discussion and ideas from local residents interested in seniors’ well-being and inclusion in community development.

Project outcomes:

1. Evaluate the inclusion of seniors’ and seniors’ issues in the OCP development process,
2. Interview several stakeholders involved in the OCP development process,
3. An invitational luncheon for key community members to discuss seniors’ issues,
4. Introduction of the SMHPL to assess how seniors’ issues have been addressed since the release of the OCP,
5. To discuss the current and future landscape of concerns, and to frame possible strategies of action by interested parties, and

6. Creation of a 15-page community document outlining the key topics and ideas generated from the luncheon.

Introducing and Applying “The Lens”

The goal of applying the SMHPL to Cumberland’s processes of community development was to highlight areas of community strength, as well as some of the unique challenges (and ways to address them) that Cumberland seniors face. Using information from the interviews about pressing seniors’ issues in Cumberland, a workshop exercise was developed using these topics and matched to specific categories from the SMHPL. Four main areas were discussed: 1) Lack of seniors’ participation in community planning (examined through the SMHPL category of Inclusion), 2) Family members relocating (through the SMHPL categories of Safety and Transitions & Challenges), 3) Housing (through the SMHPL category of Accessibility), and 4) Services (also through the SMHPL category of Accessibility).

Did applying SMHPL “change” community planning in Cumberland?

Using the SMHPL tool was very useful in better understanding the needs of Cumberland’s seniors and their ideas in community planning. Ideas generated included:

- An insurance program for informal volunteer drivers
- Development of a free informational brochure about senior-friendly services
- An increased and sustained effort to develop small-scale assisted housing
- Development of a community volunteer – or low-cost- program to assist seniors in “odd jobs”
- A small-scale education program to encourage local business to be more senior-friendly
- A local, subsidized, monitoring system from frail or ill seniors
- An ongoing participatory community forum for including seniors in community development
- A rental program to help seniors who wish to rent space in their homes

Lessons learned

- Need to carefully choose what policy to analyze – an Official Community Plan is not the strongest document to use for analysis.
- Be flexible – the project became more about seniors’ inclusion in community development generally, rather than specifically about inclusion in any one “document”.
- While the SMHPL is easy to explain and use, anyone undertaking a community workshop, with an application component, should understand this is a time-intensive activity.

CASE STUDY #5:

The Seniors’ Mental Health Policy Lens at St. Joseph’s Hospital in London, Ontario

About St. Joseph’s

The goal of this project was to find the best approach for incorporating the lens into a large health care organization to increase the awareness of seniors’ mental health issues. A secondary goal of this project was to better understand what format the SMHPL would be most useful, based on

interviews with key medical directors. St. Joseph's Health Care is located in London, Ontario and is among Ontario's leading teaching hospitals with a large seniors' patient population.

Project Outcomes

- Creation of a one-page handout about the project, a background of the SMHPL, and six discussion questions about how to best use the SMHPL in the hospital.
- Interviews with key medical directors, department heads and administrators.
- Discussions lead to development of condensed SMHPL resource materials in a handy one-page form, based on the twelve categories of SMHPL inquiry. This was designed as a "companion" document for existing tools used at the hospital.

Introducing and Applying the SMHPL

Participants included Veterans Care, Psychiatry, Learning Services and Specialized Geriatric Services. These contacts lead to further meetings with leaders in Patient Relations and Risk Management – departments who are directly involved in policy development for all people. Contact was made through email for scheduling the interviews, as well as providing a copy of the SMHPL. The interviews consisted of a brief introduction to the SMHPL (depth depending on their prior knowledge), review of the SMHPL document, a brief background of their role at SJHC, followed by six discussion questions. Questions included:

- Have you ever heard of the Seniors' Mental Health Policy Lens?
- Are there any processes in place in terms of policy and programs where seniors' perspectives and values are addressed?
- Are there any processes in place that would benefit from the seniors' mental health perspective?
- Are you aware of any examples at St. Joseph's where consideration of seniors' mental health issues specifically helped to shape the development of a policy?
- What value might be added by a specific consideration of seniors' mental health in policy development?
- What thoughts/recommendations do you have on a tool such as the SMHPL could be of use to St. Joseph's?

Did applying the SMHPL "change" medical services?

Participants felt that the process of using the SMHPL would be valuable to gain clarity, gain seniors' perspectives, and to consider other issues that were missed in policy and program development. Program leaders and medical directors interviewed also stated that they felt the SMHPL would be useful to better understand the needs of all people – not just seniors. Generally, there was a positive response to the content of the lens and general consensus that the SMHPL would be well-suited to this large organization.

Lessons Learned

- 45 minutes per interview was appropriate and effective due to participants' busy schedules
- The size of the organization and expertise in senior populations made for some difficulties initially achieving support for use of the SMHPL.
- There is not a lot of flexibility in terms of the policy development process and at senior specific hospital sites.
- Keep information short, simple and in plain language.