



canopy
Innovative Wellbeing

Leadership Guide

**Tools and resources for leaders that improve
employee wellbeing and performance**

By making employee mental health a priority, leaders create a supportive environment where people can do their best work

This guide covers the following:

- **Resources for Individuals**
- **Canopy as a Management Tool**
- **Immediate Support / Unlimited Management Consultation**
- **Referrals to Canopy**
 - **Informal Referral: Connecting Employees with Care**
 - **Formal Referral: Performance Based Referral (PBR)**
- **Leadership Development Services**
- **Leadership Micro Trainings**



Canopy is your employer-sponsored employee wellbeing program. It is voluntary and confidential. Support to address a variety of personal issues and life events is available for employees and their families, to help them feel better and move forward.

Resources for Individuals:

- 24/7 in-the-moment consultations
- Counseling
- Financial coaching
- Fertility health support
- Eldercare referrals
- Resource retrievals
- Digital self-care and development courses, forms, videos, articles, and more
- Coaching
- Legal referrals and forms
- Identity theft services
- Parenting support
- Gym discounts
- Childcare referrals
- Pet insurance discounts and services

Canopy as a Management Tool

Not only is Canopy a useful program for employees; it is also a valuable tool for managers. Canopy provides resources to assist managers in supporting of their team members and their own professional development.

Canopy helps you improve productivity, employee morale and work engagement. We can help you be a proactive manager. As a supervisor or manager, you navigate workplace challenges daily, however, some issues go beyond typical concerns such as job performance. If an employee comes to you with a personal problem, will you know what to say? If a tragedy impacts your team, can you provide support while maintaining a stable work environment? How do you deal with an employee's unexpected or inappropriate behavior? Canopy's experienced team provides your organization with the support needed to decrease employee related concerns and improve quality of life.



Immediate Support / Unlimited Management Consultation

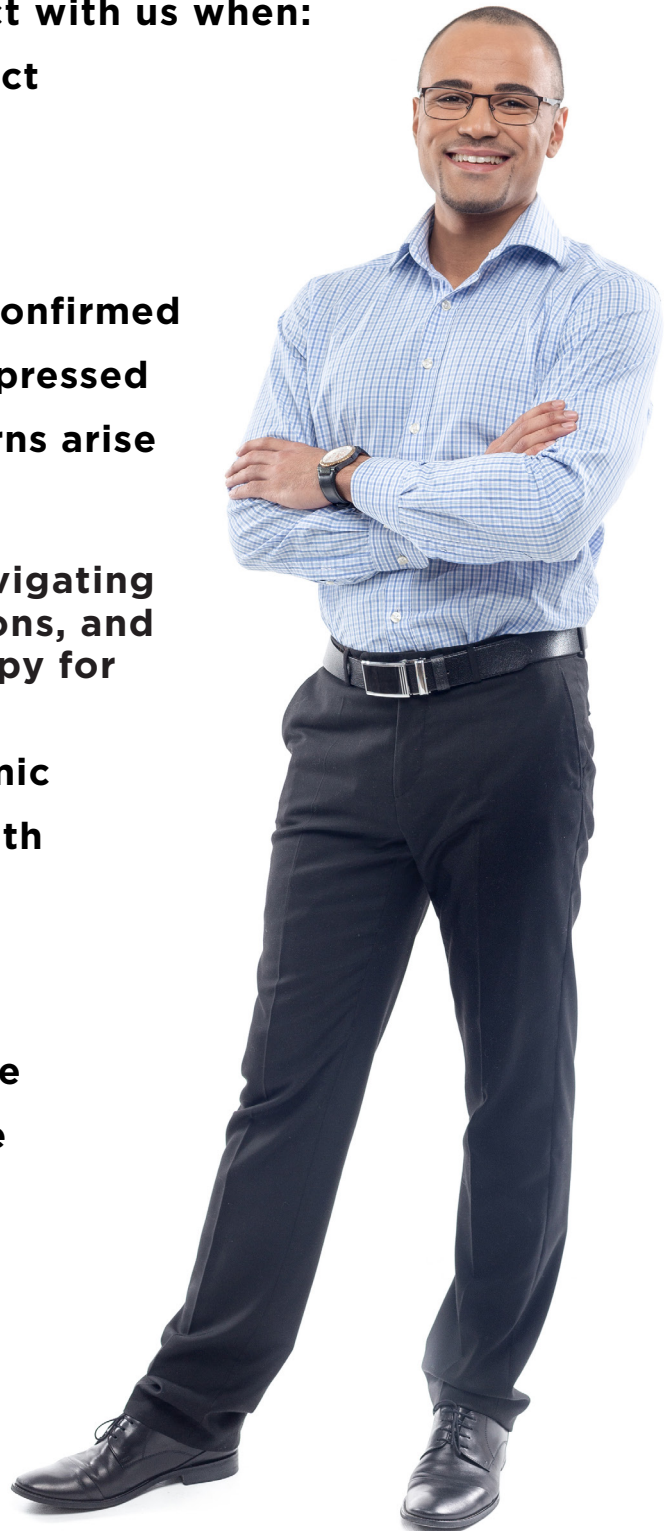
Canopy offers unlimited supervisor consultation from a specialized team of professionals, experienced in management consultation and referral. We provide expert consultation and help when an employee's personal problems begin to negatively impact the workplace. Canopy serves as a consultant to assist you, the supervisor, in staying focused on work issues. At the same time, Canopy can work with the employee to overcome obstacles that may be affecting their work. Connect with us when:

- Personal problems negatively impact the workplace
- Conflicts between employees arise
- Tragedy impacts your team
- Substance misuse is suspected or confirmed
- Suicide ideation is suspected or expressed
- Performance issues or other concerns arise

Situational Support

Managers and leaders have been navigating new challenges, difficult conversations, and unprecedented times. Contact Canopy for resources and support regarding:

- Leading through the global pandemic
- Suicide prevention and mental health awareness
- Coping with racism and violence
- Navigating trauma and loss
- Violence or threats in the workplace
- Career development and workplace reintegration



Informal Referrals to Canopy: Connecting Employees with Care

As a manager, you may observe signs of distress or distraction, or be concerned about your employee's wellbeing. Employees may also share with you that they are having difficulty managing something in their personal life. In these situations, making an informal referral to Canopy may be one of the most supportive steps you can take.

Learn about the benefit:

- Call for a management consult
- Make a test call to Canopy or personally use the services
- Explore the website
- This allows you to speak from experience and have direct knowledge

Lay the foundation:

- When possible, it's helpful to introduce Canopy to a larger group – i.e., review services available as self-care option in staff meetings, team huddles, etc.
- Refer back to orientations, promotional materials, or consider inviting Canopy to give overview to staff

Make the referral:

- Find a private 1:1 setting like a regular check-in
- Express support and share concerns – be specific in your observation
- Referring to specific services may be helpful and compelling

- Keep promotional materials on hand - wallet cards or service summaries are popular and helpful
- Services such as legal or financial may be more approachable entry points for some
- Sharing personal experience with referral tends to be most persuasive
- Use non-judgmental, supportive language throughout; normalize seeking support. For example: *"I know you've been stressed lately, that's pretty normal. I don't know if you've ever used wellbeing services before, but I recommend checking it out. You can talk to someone right then or set up recurring appointments. I used Canopy for a consult and had a good experience. I think it could really help with what you're going through."*

Seek input:

- If you'd like to review a specific situation and receive input on an approach to take, call 800-433-2320 for a management consultation

Formal Referrals to Canopy: Performance Based Referral

A performance based referral to Canopy can be a powerful tool in helping an employee improve job performance. The focus is on helping the employee be successful and reaching work goals set by the employer. When you formally refer an employee to Canopy, a signed release of information is required, and allows the release specific information:

- Dates and times of contact with Canopy
- Completion of Canopy EAP evaluation
- Compliance with recommendations
- Ongoing case management and consultation

Confidentiality standards forbid Canopy to provide information about an employee who uses the service. If you have formally referred an employee and notified Canopy, a form will need to be signed by the employee to release specific information.

Access Performance Based Referral paperwork [here](#).



Leadership Development Services*

Customizable to specific client needs.

Schedule a free consultation to learn how we can support:

- Professional development and growth
- Leading through change
- Managing interpersonal conflict
- Success in a new role
- Engagement and burnout

This service provides access to an experienced leadership consultant, an initial free consultation and option to schedule follow up sessions with the same consultant for an additional fee*.

Leadership Micro Trainings

15 self-paced short videos covering a range of topics including addressing performance issues, running effective meetings, and supporting employees with mental health concerns. Individuals will receive a certificate of completion after watching each video, as well as a final certificate for watching all 15.

To Access:

- 1. Go to my.canopywell.com**
- 2. Register as a new user or login**
- 3. Select the ‘Organizational Support’ tile**
- 4. View Leadership Micro**



Canopy

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employee wellbeing program.
It is voluntary and confidential.





call: 800-433-2320 visit: canopywell.com email: info@canopywell.com