



Nonprofit**HR**

# A Fresh Take on Wellness Planning for the Nonprofit Workforce

**WEBINAR TRANSCRIPT**

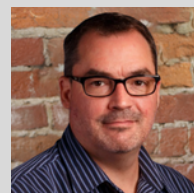
# A FRESH TAKE ON WELLNESS PLANNING FOR THE NONPROFIT WORKFORCE

The breadth of many employer wellness programs has expanded since the onset of the COVID-19 pandemic. More organizations are making an effort to craft holistic approaches to employee wellness and supporting their employees' mental health is paramount. With your staff at the forefront, now is the perfect time to begin crafting wellness programs that are unique to your organization as well. Join us as Nonprofit HR's Total Rewards and Outsourcing teams explore how to develop employer wellness programs that prioritize your people.

## Tune in to the discussion and gain an understanding of:

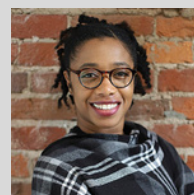
- The definition of wellness in today's workplace
- The often unused wellness benefits, programs and dollars within your existing benefit plans educate employees about their benefits with continuous conversations
- Things to think about when establishing a wellness program within your organization
- How to common points of work stressors and how to reduce their impact
- How to establish standards and model behaviors that create greater work-life balance
- How perks such as flex and hybrid schedules impact productivity and engagement

## PANELISTS



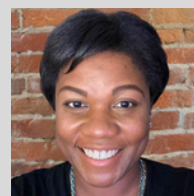
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Senior Consultant,  
Total Rewards

[View Eric's bio.](#)



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Consultant,  
Total Rewards\*

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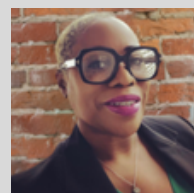
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## MODERATOR



**Atokatha Ashmond Brew, MBA**

Managing Director,  
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**Atokatha Ashmond Brew:** Hello and welcome to today's webinar, presented by Nonprofit HR, A Fresh Take on Wellness Planning for the Nonprofit Workforce. My name is Atokatha Ashmond Brew and I'm Managing Director of Marketing & Strategic Communication for Nonprofit HR. I will be your conversation moderator today. We have a lot of great content to cover. You're going to walk away with a solid understanding of how to develop employer wellness programs that prioritize your people. Before we get started, though, I have a few items I'd like to cover so you know how to participate in today's event.

You've joined the presentation listening using your computer speaker system by default. If you would prefer to join over telephone, just select telephone in the audio pane and the dial-in information will be displayed. You will have the opportunity to submit text questions to today's presenters by typing your questions into the questions pane of the control panel. You may send in your question at any time during the presentation. We will collect these and address them during the Q&A session at the end of today's presentation. Today's event is being recorded, and you will receive a follow-up email within the next few days with a link to view the recording, along with any other assets our presenters mention. You will also receive recertification codes for SHRM and HRCI in that follow-up message.

Just a little about Nonprofit HR. Since 2000, Nonprofit HR remains the country's leading and oldest firm focusing exclusively on the talent management needs of the social sector, including nonprofits, associations, social enterprises and other mission-driven organizations. We focused our consulting efforts on the following areas: Strategy & Advisory, HR Outsourcing, Total Rewards, Diversity, Equity & Inclusion and Search. We were founded with one goal in mind: to strengthen the social impact sector talent management capacity by strengthening its people.

Today's conversation will be led by Jennifer Morgan. As an HR professional, Jennifer excels in the area of employee relations and has experience in both oil and gas sectors, nonprofit as well as social services. She prides herself as a committed leader who fosters a passion for strategic change and improvement. You will have an opportunity to ask questions throughout the webinar during a formal Q&A session at the end of this event.

Jennifer, I now turn it over to you to lead this portion of our program.

**Jennifer Morgan:** Thank you so much, Atokatha. And again, I'd like to welcome you all to the webinar today: A Fresh Take on Wellness Planning in Today's Nonprofit Workforce. We have a variety of organizations in the audience today, some of you are small, others large, and we also have mid-sized groups represented as well. The one thing that we all have in common is a commitment to wellness and wellness planning, and understanding how important wellness is needed to drive our missions forward. I'm going to start with a few introductions of our panel today.

Starting with myself, as I said, my name is Jennifer and I've been in the HR sector for a little over 15 years, starting in oil and gas, but quickly realized that nonprofit was my passion. So I moved into the social services sector and quickly became hooked. At Nonprofit HR, I really lean into the grassroots advocacy space. Some like to say I like to work with the small but mighty, mighty teams. So I'm really excited to be here today and introduce you to the rest of our panel for our discussion, starting with Eric. Tell us a little bit about yourself.

**Eric Salyers:** Hello. I'm Eric Salyers, and I am the Senior Consultant in benefits for the Total Rewards practice at Nonprofit HR. I've been in the consulting space for the last three plus years, but prior to that, I had in-house roles. I've been everything from a benefits coordinator up to the benefits leader of an organization. And I've done so for a variety of sizes of organizations, some as small as a couple hundred lives, all the way up to about 25,000. And I've also been responsible for all aspects of health and welfare plans, leave of absence programs, retirement programs, et cetera. So, [I'm] looking forward to the conversation today. And Shaunna, I'll hand it over to you and let you introduce yourself.

**Shaunna Hook:** Hi everyone, my name is Shaunna Hook. I've been in benefits for about 3 to 4 years now. Previously, I was in-house HR. My background is an HR Generalist, but it since coming over to Nonprofit HR, I now focus on benefits and compensation. I worked for small organizations, large organizations, nonprofits, for-profits, as well as international NGOs. And Adam, I'm going to go ahead and kick it over to you.

**Adam Primi:** Thanks, Shaunna. Hi everyone. My name is Adam Primi, and I've been an HR practitioner for the last 17 years in nonprofit manufacturing and higher education sectors. Prior to becoming a consultant with Nonprofit HR, I was Director of Human Resources for 10 years with a nonprofit professional society of oncology nurses. During that time, I oversaw the implementation and growth of their wellness program, while also advising other colleagues in the industry on wellness programs and initiatives.

Wellness is something that's near and dear to my heart. I've always felt that a healthy workforce is an engaged and productive workforce, and I'm looking forward to the discussion today as well.

Jennifer, I'll turn it back to you.

**Jennifer Morgan:** Thanks so much. Altogether, we create a panel with a comprehensive mindset towards wellness, or as I like to say, with these HR powers combined, you all are in for a great discussion today. Just a couple of things that we want to cover before we get moved into our panel discussion. We did capture some learning objectives for our conversation today that you all can see here.

We'll be talking about wellness in the workplace, then and now; how to get the most out of your wellness benefits priorities when establishing a wellness program; work stressors and their impact on the business; work-life balance; how to talk the talk and walk the walk; and then, finally, wellness perks and employee engagement. So, we have a lot to cover in our discussion today. Some of the people did submit questions before this session, and we will incorporate those into our chat, as we can. We'll also have a Q&A session at the end of our discussion, and feel free to post your questions at that time also.

So, we'll go ahead and move into our discussion. I'd like to set the stage by talking about the definition of wellness in today's workplace. As HR consultants, we've seen a lot of things that have been impacted by COVID-19. And certainly, the workplace is one of those impacts. When it comes to wellness, we're seeing a lot of different things in how we would define it today.

The most important thing is that there's more awareness in the workplace now around the topic of wellness. Before, organizations felt if they had an EAP plan or maybe outsourced counseling, that was all that was needed to suffice and to keep their organization running smoothly. But with the impact of COVID-19, we've seen that everyone has been affected by mental health wellness in some sort. As a matter of fact, the CDC reported that 41.5% of staff experienced depression and anxiety on a daily basis. These are higher numbers than we've ever seen before and a direct impact of COVID-19.

Today, on the topic of wellness, as you all know, there's many dimensions. There's financial wellness, there's physical wellness, there's even environmental wellness. But when we chat today, we are going to be focused on mental health wellness. Some of you may call it emotional wellness. Leaders are now more aware of mental health wellness needs in the workplace, but they're still hesitant to act, both by investing time and resources. So we're happy that you've joined us here today, because we really want to talk through the key components of both implementing and developing a wellness plan for your organization.

Some other impacts and things that can define wellness today is we're working in a different environment that's causing other stressors. I'm going to talk a little bit more about that later, but there's some workplace stressors that we haven't been exposed to before that also has been a direct impact of COVID-19.

Finally, there's a huge sense of your employees and staff to have a sense of belonging, purpose and community. Before, employees were really concerned about how well they were doing in their role, and how they could achieve and be promoted to the next level. Now, that's still a concern. But the current state of wellness is also showing us that employees really need to feel a sense of belonging and community in their work environment.

And so, a wellness planning and program is just another way to achieve that goal. And by doing so, you avoid what we call now the Great Resignation. What I mean by that is, if people are not seeing or getting what they want in their work environment, including wellness, they're leaving and going elsewhere. So again, our conversation today is going to focus around ways that you can keep that from occurring at your organization and different ways that you can implement wellness programs that fit your needs.

I'm going to open it up for discussion now, starting with Eric and Shaunna. I know I touched a little bit on about wellness in today's workplace, but I also want you all to speak on what organizations really need to focus on to get a wellness program started. What are those first initial steps in wellness planning that you all are seeing and that you find are important?

**Eric Salyers:** Oh. Go ahead.

**Shaunna Hook:** I think one of the biggest things to remember is that a wellness program or a wellness initiative is not a one-size-fits-all. Right? So your organization is small. If your organization is small, you may want to start with what's an initiative versus a program. Right? An initiative can be something simple as, "Hey, let's altogether take a walk at 12:30 for 10 minutes right around the building." Or if you're in a virtual space, maybe as, "Hey, we're going to put something on our calendar. My expectation is for everyone to take a break for 10 minutes. No one should be online. Calendars are shut down." And that has to start from the top. So, if your employees see that the CEO, the deputy director, or so on, and so on, are offline, everyone else will likely be offline as well.

When you think about the program, if you have a larger organization and you may be able to afford it, I think one of the things that you may want to consider is actually connecting with a vendor to help you run that program because it can be a heavy lift.

Another great aspect is making sure that you gather employee feedback. Never stop an initiative or program without having your employee feedback because they know what they want, and they know what they need as well.

I think another big thing is make sure you review your benefit toolbox because sometimes you already have the things that you need that will satisfy your employees. Look at what you already have available. So, maybe it's telehealth for mental health. Maybe it's the EAP services that may be attached to some of your ancillary benefits. There's Health Advocate, which is also provided to EAP services. And then, of course, always look at your work-life balance policies you currently have in place and look at ways in how you can enhance them.

There's also CareFirst, for example. [It] has a medical policy with an initiative platform called Sharecare, and then everyone has a broker. I think that is an opportunity for all organizations to really utilize your broker in the way that they should be utilized. So have them provide information on all the benefits that are attached to your medical, dental and vision. Because sometimes they miss things, sometimes you may miss things or sometimes you might see things that your broker may not have spoken about and you want to bring it to their attention, so that everyone else in the organization is knowledgeable of those type of programs that would be available.

And the last thing would be bonus dollars. And I think Eric has a little bit more information surrounding wellness dollars and what organizations can do with that.

**Eric Salyers:** Thank you, Shaunna. One thing that I kind of want to hit on, Jennifer, is I think it's important as you're listening today, if you don't have a program in place right now, or you don't have any initiatives, remember that you have to crawl before you walk, walk before you run and run before your sprint. So, Jennifer mentioned that later on, she's going to talk about some of the stressors that are pretty much on the top of minds of employees and employers today. And certainly, those stressors makes sense. We probably have all felt them sometime in the last, what is now, two years of living in this new hybrid kind of work model, where we were all were sort of abruptly thrust into working remotely, trying to figure out boundaries between home and the work life while also dealing with—maybe just suddenly, inside your small space apartment with a spouse and kids and trying to work that you didn't have to do before. And on top of it all, new variants are coming out. We kind of thought we were getting towards the end of this and now omicron is out there, right?

So, we understand the stressors that are out there and setting things up, as Jennifer mentioned, she's going to go into some additional ones later. But certainly, if you don't have any kind of wellness initiative going on right now, we don't want you to think that you have to go out and completely set up a full-blown program just to address some of these things today. Now, certainly, you can do that if you have the ability to do so, you have the support of leadership and all that kind of stuff. But, one thing that Jennifer said that I really liked is we're drawing attention to the mental health aspect. So that's been an aspect that's been in wellness programs for quite some time, but it's kind of just sat over there in the corner. And some of that, I think, is attributed to the unfortunate way that mental health is looked at in the United States. There's still some stigma associated with that. And benefits and medical plans for mental health activities and services, those are lacking sometimes. So mental health is always, like I said, we've acknowledged it, but it's been over there.

But one thing that the pandemic did was really give permission for employees to say “Hey, I’m not OK.” And it’s OK that we’re not OK. So to expand on some of the things that Shaunna mentioned, it really does depend on the size of your organization, what your goal is and if you’re going to use a vendor, like if your budget supports that, it really is, like what she said, there is no one-size-fits-all.

And so, I want to re-stress something that she said as well about getting some feedback. Make sure you really understand your problem before you sit down and start to craft a solution. Perhaps you’re an organization that already has a culture that’s just very open, and employees feel very comfortable coming forward and sharing their concerns, maybe that’s not the case. Are you only working off just a few employees that are being vocal? If so, consider doing a survey using the tool like SurveyMonkey or maybe doing a focus group where you just grab everybody together in a Zoom or something. And gather some feedback and make sure that whatever initiative you’re about to embark upon, that the solution that you’re architecting and putting together has the ability to sort of address those concerns. But I’ll tie it up here because there’s so much to talk about on this topic. I’ll try to be brief, Jennifer, sorry.

**Jennifer Morgan:** No, you’re fine.

**Eric Salyers:** Wellness dollars. So, sometimes it depends on the size of your organization and your corresponding medical plan.

But, sometimes, there can be dollars that a medical insurer has set aside to help with wellness initiatives. It’s going to be dependent upon how that insurer is, how they filed and how they how they are setup in the insurance industry because all that stuff is very heavily regulated. But someone, if you have a couple of hundred lives, it could be that you might have that already, or you can work with your broker to get that. But like Cigna does it, Aetna does it, they might say, “Here’s \$10,000 that you can use through your plan year to contribute towards the wellness initiatives.” And I’ve seen organizations use that money to buy Fitbits and then set up workout programs. I’ve seen that money used to pay for webinars, where somebody comes in and talks about how to set boundaries at home, and stress and all that kind of stuff.

I will pause there, Jennifer, let us keep going. Like I said, I could keep talking on this topic for a while.

**Jennifer Morgan:** No, that’s fine. This is a really large topic that we’re covering today. And so, while some of you may be taking notes, just a reminder that this session is being recorded, so you can refer back to some of our conversation.

Adam, I do want to turn it over to you. With your experience at the HR director level, you've certainly implemented and facilitated quite a few wellness planning, probably, committees and even programs. What are some key takeaways from your experience that organizations can refer to when it comes to the initial stages of wellness planning and how to really get that buy-in that's needed?

**Adam Primi:** Sure. Thank you, Jennifer. I think Eric and Shaunna have already hit on some important points, which is crawl before you walk, walk before you run and run before you sprint. It's important to start out small. It's important to get employee feedback. And it's also important to gather feedback along the way.

Three critical things that I found to be very instrumental in establishing a successful wellness program are, first, having leadership support. So, you want to make sure that leaders are visibly participating in the program and that they're engaged and that they're involved in the program. If they don't believe in it, then, in my experience, you'll have less success making a successful wellness program work in an organization.

When talking to leadership or decision-makers about a wellness program, you want to make sure that you're speaking their language. So, if the executive leadership or those who are making decisions about resources that could be allocated towards a wellness program, if they're very financially oriented but not necessarily concerned about metrics, you want to be able to talk numbers with them and make sure things are costed out.

If, on the other hand, they're more concerned about ROI or they're concerned about metrics associated with wellness programs, you want to put some thought into how you're going to measure the success of those programs. It doesn't have to be anything complicated. It could just be as simple as, number of programs offered, participation levels in those programs and then, really just a willingness to start and have a wellness program initiated.

Another leadership group that you want to make sure you have involved are your supervisors and your frontline managers. Those people that are going to be directly supervising important employees and who are going to be directly involved in scheduling breaks or having to work around time dedicated during the workday for employees to participate in those programs, you need to make sure they're bought into the process. If they're not, then they're not going to allow their employees to participate. And in my experience, you'll end up with pockets throughout the organization where you have high participation levels in some places and low participation levels in others.

Second factor that you want to make sure that what you have in place relates to what Shaunna was talking about, that there is no real one-size-fits-all program for any organization. You want to tailor it to your organization. My advice would be not to offer several programs that maybe are not-so-well run. But it's better to have a few targeted wellness programs that are going to be run very well to ensure participation, rather than try to offer many things at once to get the feel that the program is robust. So, try to tailor to your organization's needs.

And then, lastly, you want to make sure you want to have the capacity to carry it out. So, one example, I have several examples actually. The two that I can really relate to as far as having capacities to run these kinds of programs, is, we had at my last organization a healthy snack program, where within our department, HR, we would go out and we would buy snacks, bananas, fruit and nuts. And we funded the program through low-cost donations.

So, for example, if you wanted to bag of nuts, we would go to Costco or we would go to Sam's Club, buy a whole bunch and then, we're able to offer that to employees at a cost. They would throw a quarter in, \$0.35 cents or whatever the cost might be. Of course, it's dependent on trust, but we also had a wellness committee that would support us. If we didn't have participation on the wellness committee, and if people were not able to go out and purchase those items, then it fell within our department to make sure we kept that program running. So, we have the capacity to do that, but if you don't, then that's not the kind of program that you might want to offer.

Another program that we offered was having food delivery from a CSA deliver food on-site. Now that's, at first it was a great idea. A lot of people really enjoyed it. We have a lot of interest in the program. But after a few months, we only had a few people participating in the program and so, the vendor that was supplying the food to us said, "Hey, you know, we can't really do this anymore." And it got to be—it just wasn't popular enough to continue the program. We also have refrigerator space where we were able to store the goods and the food that was coming in from the program, but you may not have that. So while it's a great idea in theory, and it may not cost a lot, it might not be something that you have the capacity to run.

**Jennifer Morgan:** Great. Thank you so much, Adam. These are great tips. We've talked a lot in all of our discussions so far about communication, whether that be communication up, down or left and right. I'd like to pose a question to the audience, and if you all could type in your question panel, how often you are communicating about wellness in your organization?

There are no wrong answers, this quiz will not be scored at the end, but we as consultants are curious to know how often you are having the conversation. And while you're answering that question in the question panel, Adam, for organizations that feel as though they could be communicating more on the topic of wellness in their environment, what are some ways that they can achieve that?

**Adam Primi:** Well, one way that that can be done, of course, is with surveys. So, we know, it was already suggested, to use SurveyMonkey. There are lots of tools out there that you can use that are low or no cost to be able to get a sense of what employees may or may not be interested in in terms of wellness programs.

Another very effective way of communication is just one-on-one conversation between supervisors and employees. So again, this is where that engagement is very important. If, for example, you have a supervisor who is not bought into the program, for example, you may have customer service. For the job that requires attention to the phones, breaks can often be very heavily regulated in terms of making sure that customer service is being delivered to members or to other people. If you have a supervisor that is not bought into that program, they may not be having those conversations. So, it's important that somebody is the point person and is monitoring and just having communication with supervisors or leadership about those conversations.

It doesn't hurt to ask, "How are you doing?" So, asking employees, "Hey, how are you doing?" "What's new?" "What's concerning to you?" "What's going well, at work?" "What can we be doing differently?" A lot of times, there's a fear to ask those kinds of questions in that it's going to open a can of worms, I'm going to hear something that I don't want to hear, no news is good news. But, in reality, you really want to try to be having that open dialogue with employees. In my opinion and experience, it's better to know so you can address those issues head-on than it is to hide from them, or just simply not address them.

However, this is also where commitment from leadership is important. If you're going to ask the questions, you need to be able to make sure that some action is going to be taken on them, and that regular communication is occurring back to employees about what's being done to address concerns that are raised in the workplace around wellness or around mental health issues, stress issues, work issues. You don't even have to ask the question, "How are you doing?" You could phrase it a little bit differently and ask the question, "Tell me what we're doing well as an employer to help support your needs at home and at work, and what can we be doing differently." So you're taking it away from a good or bad issue, and turning it into, what are we doing that's working, what could we be doing differently? So, survey tools and verbal one-on-one communication are often very effective in communicating to employees with wellness programs.

**Jennifer Morgan:** Wonderful.

**Shaunna Hook:** If I can just add to that really quick, because I think you hit on something, Adam, about just having conversations. The more conversations you have about wellness and mental health, you start to normalize it. It makes it OK, right?

Because normalizing mental health, it encompasses your thoughts and feelings, and it shows that the organization truly cares about the being—you as an employee—and not just the bottom line, right? And then it builds trust. And so, you, as a manager, can also model that same behavior, and lead by example, and share some of your experiences. But I would caution you just to be thoughtful in what you do share. But that shared experience, that dialogue will help continue to build trust with an organization. And then, it just starts to show the commitment that the organization has to the staff and how they truly want to prioritize the well-being of their employees.

In addition to that, managers and leaders can also begin to share tools and resources that the organization has available for the employees to utilize. I think that's important for managers to know, just the baseline of the benefits that are provided by the organization. The more employees know, the more managers know about this stuff, the more employees will be productive and engaged. And at the end, I think what you will find is that you will have a thriving organization, you'll create or enhance a culture of well-being, you'll likely see the performance of your organization raise and then, employees will be less prone to burn out, because they know the tools that you can utilize to help them. And then, they'll also feel comfortable coming to you when an issue may come about.

**Jennifer Morgan:** Great. Eric, did you have something to add?

**Eric Salyers:** Just a couple of quick conditions as well. Communication is really key about your program, and I also see this just in benefit programs in general. But quite often, if you do have a formalized wellness program, it is probably landing under your benefits function. But, I think it's kind of a no-brainer. Most of us that are putting these things together, initially, like, "Yeah, we going to tell them that it's new." But there's a focus on in the beginning only. "We're going to announce that we're going to do a deck. We might have some emails and whatnot," but I would encourage you to think beyond just the initial launch, because it's a lot of information all at once.

You can kind of track it when somebody's leading you through it. Today, if we were presenting this to our staff, and we had a deck, they could follow it because we're guiding them. But if you do a whole lot of information all at once and you're not doing that throughout the year, you're really missing an opportunity. And that opportunity, if you take it, is going to lead towards your program being more sustained and fulfilling.

So, make a strategy. I mean, it doesn't have to be as complicated as that sounds. You don't have to have a whiteboard full of black dry erase with all kinds of stuff on there. But think about the different ways in which you're going to... You might launch the program with a Zoom, where you allow people to ask questions in like a town hall format. But later on, maybe a month from there, you're doing a newsletter. And keep in mind, I'm not a huge fan of using email as an exclusive tool to communicate to staff, because we all have an email burnout, right? Probably in the half hour I've been in this presentation, I've had 25 new messages land in my inbox.

Think of out of the box ways in which—think about how we get our information today. We've got our phones in our hands all the time. If you've got a marketing department in-house, maybe you can leverage some of that kind of stuff. But think of fresh, new ways to continually throughout the year remind your staff of the initiatives you've launched, and add a new little carrot, just something that makes it exciting and keeps it going. Otherwise, you have a big push at the beginning, and then it will start to taper off.

**Jennifer Morgan:** Yeah. That's a great point, Eric. I like the point you made about email burnout, because that's certainly defined as a workplace stressor. I want to shed some light on the topic of stressors in the workplace, and that kind of just expands upon some of the things we've already shared with you all here today.

Starting with—to Shaunna, Adam and Eric's point—don't assume that you know the state, the current state, of your employees' wellness. Or do not assume what the workplace stressors are in your organization. It's always best to capture this information by a survey, informal conversation or even a wellness committee.

But when it comes to workplace stressors, there are the ones that we are used to hearing. Things like, "My capacity is overflowing," "My plate is very full." There are also the common ones, especially in our nonprofit sectors, of—we work with minimal people resources, so a lot of times people are running a little bit more lean than you would find in other sectors, meaning that we wear more than one hat, typically in our day to day. That's been a big stressor. It's also been compounded by, again, the impact of the pandemic.

And so, stressors that we've seen before and frequently are now compounded because we're either decentralized in remote environments or we are in a hybrid model and having to adjust back and forth. Or even for those of you who are reporting to a work site every day, your actual physical space looks much different than it did on pre-pandemic.

So these are all stressors that you want to consider when you're doing your wellness planning and also when you're determining to implement your wellness program. But again, make sure you capture that feedback from your staff before deciding what you want to prioritize in your wellness planning.

I would hate for leaders to put forth all the time and effort to establish a program and a plan, only to find out it's something that their employees didn't necessarily need. We had a great question from the audience before this session. And someone asked: What are some uncommon workplace stressors? Which I thought was really creative.

One thing I wanted to note here is just remember that workplace stressors are relative, and so ones that may be defined as uncommon, or maybe that you haven't heard of before, it's very common for that staff member. That staff member is trying to function in that space and needs some support in doing so. So, when you come upon a topic that may be an uncommon workplace stressor, just know that it is relative that employee, and you should be viewing it with the same importance as we do of those more common workplace stressors.

We've got things also like, we talked about email burnout and Zoom fatigue. That's a new term that just came about during the pandemic. And so, how can you address that? Using some of the tools that Shaunna mentioned, things like meeting-free workdays or allowing at maybe internal meetings to have off camera access will also be helpful. These are things that you just want to consider when you're doing your wellness planning to really identify what those stressors are. And just like other parts of your wellness program, you'll want to cater to your environment. If your population tends to do work that's defined as more emotional than others, or more front facing, maybe you work in a group that deals with constant pushback and rejection, you'll want to be sure you cater your plan to those stressors.

Atokatha, are we seeing any trends from the question that we asked?

**Atokatha Ashmond Brew:** Yes, we are, Jennifer, we are. And some of those are: yearly. That's what some folks have said in terms of how frequently they're communicating. Monthly during staff meetings.

Someone said, "We attempted to do this once a week."

Someone else said, "We release wellness resources monthly to our staff."

Here's another, "There's been a big conversation about this recently. We're talking a lot about mental health wellness and what an initiative would look like."

And then, someone else shared that they have regular wellness webinars for their staff.

**Jennifer Morgan:** Wonderful.

**Atokatha Ashmond Brew:** Yeah. Someone else shared that they do it during annual enrollment, and then last entry, and there are several others, but this is one that I'll read us: "It feels more ad hoc to us. We did a survey earlier in the year, and it sounds like folks are wanting better health benefits that cover mental health services versus group wellness activities in the workplace."

**Jennifer Morgan:** Great, thank you for those responses. It really supports the conversation that we've had so far. Cater your plans and your conversations to your organization, from ad hoc all the way to annually, but also be sure that you're finding out what your employee staff needs, and just have that continuous conversation. So I want to encourage you to use the tools that we're talking about today to keep continually that communication around your wellness planning and programs.

I want to talk a little bit now and move into the topic of work-life balance. And so from our learning objectives, we described it as talking the talk and walking the walk. Sometimes we all know the right things to say when it comes to wellness and work-life balance, but we have some difficulty putting it into practice. So I'm going to open this up for discussion to the panel. Starting with Adam, can you share a little bit more about some key components of work-life balance?

**Adam Primi:** Sure, yeah. I mean, I think one thing to remember is that every day people bring with them to work their lives. It would be great if we can leave everything that's going on at home at the door, so to speak, or when log onto the computer. But the reality is, that's not always possible. They bring with them the rest of their lives or things that are going on in their lives and that, it, follows them to work. I think when it comes to work-life balance, it's very important for leadership to make sure that they're modeling that behavior.

So, for example, if we're going to say as leaders that we shouldn't be working on the weekends or we want to encourage everybody to take their PTO, it's very important to make sure that we're paying attention to the workload and pace of work to ensure that people have the ability to take that time off without feeling guilty about it and make sure that culture exists. Sometimes there can almost be a culture where it's worn as a badge of honor that somebody carries over a lot of PTO time from one year to the next. That's not always a healthy thing, and so, if that's happening, it's important to find out why that's happening.

It's also important to address pockets of inconsistency within the organization. So, for example, you could have instances where a team is very loyal to a certain leader or certain supervisor, and they almost form their own little mini culture within the culture of the organization. So, if, at the leadership or supervisory level, a message is being sent that we want to make sure that we're taking time off, that we're not working on the weekends, that we feel like we can close the laptop or log off the computer at the end of the day, you don't have a rogue subculture within the organization within a specific department where they're doing things differently.

The reality is that people see things. They see how other teams are interacting. They see what other teams are doing. They see how other teams might be or the supervisors might be administering certain benefits when it comes to time off or to work flexibility. And you want to make sure that that's being done consistently across the organization. It might be difficult to do that. You may have a very high-performing team that's running much differently than elsewhere in the organization, and there's a reluctance to disrupt that culture. But if we're trying to send a message that wellness in the workplace is important and you have a rogue subculture, for maybe lack of a better term, and it's going against that. It's important to make sure that that's being addressed. So that's part of the communication, having some of those uncomfortable conversations.

**Jennifer Morgan:** Great. Thanks for that, Adam. Eric, did you have something to speak on this topic?

**Eric Salyers:** I do. I actually think that work-life balance policies and initiatives that an organization can maybe take a look at it and maybe modify, I think that's one of the biggest opportunities here and also an easy opportunity.

And I know today we've iterated a couple of times this can be, if you've got a full program that certainly you can look around in that wellness program and certainly find things that help address employee stress, employee assistance programs and all that kind of stuff, but what we kind of have honed on a lot today about the stressors that have come, bubbled up, according to the pandemic. And this is where I have seen in the past, like here, the clients that I've been working with here at Nonprofit HR, I've seen a lot of creativity in this space, and I think it's a real big opportunity for organizations.

So you'll have to sit down and think through what will work for your business flow, but just to throw out some of those ideas, I've seen organizations, some progressive organizations, have every other Friday off as sort of like a mental health escape for every other week to deal with the stress. I've seen a little bit more scaled back of that and just say Friday afternoons are off.

There's certainly appetite from employees for compressed schedules and this is rather progressive, and I would love to see this initiative catch on. What I'm talking about here—let's say that you regularly work a 35-hour work week, five days where you're working seven-hour days a week. If your culture supports it, your business model, and you know you can get things done, maybe you go for eight-hour days. You're getting close to that 35, but allowing employees to have a whole additional day off to recoup and recover. If you've got, let's say you've got three program coordinators on staff, maybe one's having Friday off, one has Monday off, one has Wednesday off. The sky's the limit. You just you need to sit down and think. I forget who on the panel mentioned it, maybe Adam or Shaunna, maybe both, culture is such a big thing. When we're thinking about the stressors that we're talking about today, the type of culture that you're setting at your workplace is likely influencing that, either adversely or if you've got a great culture, it's probably helping.

But there's a great opportunity, so stop and think through, think about your culture, what kind of support, what types of differences can we maybe plug and play here to give staff some, just a little bit more time off? Or just shift the way the work week looks. I mean, any of those initiatives that I've seen an employer to put into place. I've seen those well received.

**Jennifer Morgan:** Great, thanks for mentioning that, Eric and it does bridge us right into our final topic, one that I consider a fun topic but speaking of creativity, what are some wellness perks or fringe benefits that employers can maybe look into? And how does that impact employee engagement?

**Eric Salyers:** Yeah, this is another area that I really have seen change a lot during the pandemic. I've seen a rise in what the industry is starting to refer to as lifestyle benefits.

To give you an example, sometimes, and this is usually accomplished by coordinating with a vendor and you're paying a per employee per month type of charge. Other programs, maybe you're allocating a certain number of points into a bucket and then, those employees can use those points to buy services. So, one reason early on in the pandemic I liked these is one program out there allowed you to buy Netflix. Remember how we were all burning Netflix and Hulu and Amazon Prime on blast last year.

But there's also things there that support holistic wellness. They could use those dollars for, I can't think of the name of the vendor right now, but Apple launched in the last year, they were competing with the Pelotons, where you could get up on your TV with your Apple TV, and you're watching a yoga instructor. The main instructor's there and there's two in the back, and they're kind of demonstrating stuff.

So, these lifestyle benefits, they're widely varied and they speak to a lot of different needs. They also helped with childcare and elder care. It's all across the board. Those types of things through a vendor, I think that's a really cool and fresh approach. As I mentioned before, these work-life balance things, that's considered a perk in some way as well. That's certainly how I would describe it in my organization and things of that sort.

Shaunna, I'll let you chime in any things that you've seen or any ideas that that you've got. Great to hear those.

**Shaunna Hook:** Yeah. So I think you mentioned it already a little bit, but I think what everyone will see, like the recurring theme that we're saying is, organizational culture matters, right? But so, I'll go back to having the policies. Update your policies. Take a look at your—it doesn't hurt to update your policies. Then, you have no-meeting Fridays. So, no-meeting Fridays can definitely boost productivity. So maybe it's just no-meeting Fridays for external meetings. And yes, you can continue to have meetings internally. In doing so, allow your employees to...start to brainstorm on different ideas, come together on things they might have missed throughout the week, right?

Virtual education. I know, we had some people say that they provide educational benefits throughout the year. Good. Keep that up. I have personally found when working with my clients, that providing benefit education at least two times a quarter has been extremely beneficial. Let's say, maybe around December or around your open enrollment, you start to talk about FSA because those things are coming up. They're coming up all the time.

And then, newsletters. So, we mentioned newsletters already. But, I know some people get tired of newsletters. They are a great opportunity. In fact, during that no-meeting Fridays, employees can talk about the newsletter and what benefits are currently happening.

I think another great opportunity which can help the organization, as well as managers, is during your meeting, at the top of the meeting, just checking in with employees and see how they are doing. Whether you're saying, "From a scale of 1 to 10, how are you feeling?" Or, maybe it's a color situation where green you're doing OK and red, you're just like, I'm not there yet.

**Jennifer Morgan:** So, those are some great ones. And these are all, this topic ties back to communication as well, because you want to find out from your employees what perks or fringe benefits would speak to them. I know I have one client that has just started paying for pet insurance for their employees, but the only way they found that out is by asking the question. And, it turns out they had a large percentage of pet owners on their staff and a high amount of stress over those unexpected, or even maintenance, vet bills. And so, that was just a great example of getting the employee feedback and being creative in their benefits model and in their wellness.

I'd like to move into a couple of audience questions. One was posed before this session, and I think it's great. It is, as we said, many organizations have brokers, some do not. But for those that do or maybe those that are seeking to identify one, how can you tell if your broker is good? They're stating that they're in their little umbrella, they're in their lane and so, how can they tell if they have a good broker or not?

**Eric Salyers:** That's a loaded question, Jennifer. A lot goes into an organization making that selection. We do that work at Nonprofit HR. I have helped several nonprofits this year select a broker. But the way we approach that, first, I would meet with the client, so you as an organization will decide what's important to you. What are you looking for? There are always table stakes that you always want, right? You want somebody that's going to be strategic, a good communicator, that's got a lot of resources available to help you who certainly has the experience and they're in your market. All of those things that you just kind of look for right away.

But then, after you launch your RFP and you get their proposals back, it's really about like diving in deeply, asking the right questions, coming up with the right type of scenarios. I asked things like, can you give us a model of what your communication plan would be for open enrollment? Can you tell us what it would look like throughout the year? Do you have any type of services that help employees with claim issues? So it's really just about vetting the resource well, doing your homework, and you can also, certainly, ask to speak to references of brokers and guide them and ask them to try to find a similar organization that you feel like you can see part of your organization as well.

But the broker relationship, I can't overstate the importance of that. One of the common things I see when I first walk into a nonprofit and start to do some project work with them is that they don't really fully understand that relationship. I think the thought is, the broker is just somebody that's over there in the corner, you got to have it. Maybe it's kind of getting mixed up in the head about how we think about brokers on Wall Street. I don't know. But I frequently recognize that nonprofits don't always think about the broker in the way that they should. It's your primary benefits consultants, they are sitting there waiting for you to reach out to them. They should also be reaching out to you as well. That goes back to, when you're vetting a new perspective broker to find someone that's going to be engaged with you and proactive instead of just waiting for you to come to them. Your broker is a key partner through your benefit plan and can be very, very helpful in helping you find vendors that are going to work with your program or just flesh out some other resources. We can't reiterate enough, wellness programs can look like all different sizes and shapes. You can use all kinds of ways to put those together.

**Jennifer Morgan:** Another question we had is a common nuance that organizations see and we certainly see as consultants. You've put time and energy into your wellness planning. You've started the communication and then, the initiative stalls. What then? What do you do when you hit that wall? How do you pick things back up and how do you keep it a priority? Because we all know the benefits of a great wellness program.

**Adam Primi:** Yeah, I'd be happy to answer that.

Jennifer, I think I've seen this happen several times. One thing is to try to get a sense of what happened. Why have we stalled? Was it due to lack of participation? Was it due to—sometimes wellness programs are the shiny new object. It sounds great, we've got this great program, these benefits sound amazing but when it comes time to actually implement them or have people take advantage of them, we find out that maybe that's not there.

I think another thing is to make sure that you can admit when something's not working. Right? So, if you have some programs in place, and they're not working, don't be afraid to say, "Hey, you know what, we tried this, it didn't work. We didn't have a lot of interest in it. We may have had one or two people that were really behind it, but ultimately, it just wasn't working."

And I think culture also is another big piece of it. It's not just HR's responsibility to run the wellness program or the benefits department to run the wellness program. But really, it's important to have a healthy culture of wellness within the organization, not only for the programs that are being offered, but in having respect for one another to participate in those programs.

For example, if we're going to be taking a 10-minute break to participate in maybe just a brief stretching session or a quiet meditation time [and it] helps some other people to be more effective team players, then it's important to have respect for that. Just as you would want somebody to have respect for what some of your own interests are.

**Jennifer Morgan:** Yeah, Eric?

**Eric Salyers:** Adam, I like those points and some additional things I can color around the lines there. Some ways that you can kind of help ensure that you are successful is, if your initiative supports it, consider involving employees as champions, meaning you get employees from different backgrounds in your organization. Try to get different demographics, different levels, like entry level, mid-level management, all that kind of stuff. Get champions that are really on board with you from the get-go that can also—it's exactly like it sounds, that can champion the program for you and they're helping. It's almost like what social media influencers do today on TikTok and stuff, right? Those folks that are on the ground, that are peers with the individuals with whom you're working, they can kind of help keep that motivation and keep it driving.

I know it's been said a couple of times, it can't be overstated: Make sure that you are truly bought-in from a leadership perspective. Nothing's going to kill this faster than, "All right. We surveyed our staff, we hear their stress, they just don't have enough hours in the day. We're going to do some of these work-life initiatives. We'll give every Friday afternoon off or something." Or, "We're going to strive for no emails after 7 p.m. to 9 [a.m.]" And then, you have a CFO and a program director sending out, "Hey, I need these budget numbers," and it comes out at 9 p.m. Those types of things, it is easier said than done, right?

It's easy to get excited about these initiatives and say, "Yeah, we're going to do it," and not really think through, what is my culture? You've got to be really self-reflective. Get your leadership team together when you get ready to make this decision, and you might have to start with yourselves. You might have to make those modifications and adhere to them. That's all I wanted to add to that.

**Jennifer Morgan:** Great. Thank you. Well, that covers our topics for today. I'd like to move into the Q&A portion, but before that, just do a recap of the topics that we discussed with you all today. Wellness is a large topic, but do not be intimidated by it. You've already taken the first step by attending this webinar and finding out best practices and some tools that can benefit your organization.

Just remember that some things we discussed today is that wellness should go beyond awareness and as organizations, we are expected to act on promises of wellness. As we've stressed, and Eric has expanded, utilize your broker and get the most out of your wellness benefits. Continuous communication with your staff is key. Both Adam and Shaunna shared different ways about how that directly relates to your culture and some ways to avoid some missteps there. We have to walk the walk when it comes to championing work-life balance. It's easy to say, but we also have to do. And then finally, don't forget about those niche perks and fringe benefits. Get feedback from your staff, get creative with what you want to offer and utilize your broker in making it happen.

So, those are the topics of discussion for today. We really appreciate you joining us and now, I'd like to turn it over to questions for our panel.

**Atokatha Ashmond Brew:** Thank you so much, Jennifer, and thank you to the panel for such a great conversation. We do have questions that are starting to come in. I want to remind the audience, if you have any questions that you would like our panel of experts to answer, please type those into the questions pane. We will get to as many of them as we can. Here's one question, Jennifer.

HR—and this is more of a statement that is coming through as a question—HR receives low participation from staff, even though they ask for wellness initiatives. We're hoping that staff will take the time to respect what we're doing to benefit them and participate. Any thoughts on that?

**Eric Salyers:** It's tough, right? I mean, I've been in the house. I've actually put these programs together and actually had this kind of experience. You always have to factor in that the human experience is involved in this as well. It's easy to be excited about it one day and then, you launch it a month later, and somebody's having a bad day and they just don't want to do it. It's where you have to not be discouraged. Like I said, try to use those champions to help keep employee participation going.

And try to, I know it's hard to do, but try to think in advance as much as you can as you're planning out your initiatives. The newer and fresher things, something that can have like some sustainability, that you think you'll be able to drive enough interest around and keep it going. You have to be constantly evolving and agile when you run your administering a program like this. It's like that metaphor of battling the many-headed dragon, you slice it off and the other head pops up. You might see these things stalled. You can then try to run some intervention like, can education help? Can getting a panel together? Can I do some kind of incentive where if you do X, Y and Z component of our program, you get put into a lottery to be considered for an extra one day off? Any of those kinds of things, and as Adam mentioned as well, at some point you may have to evaluate, maybe this program isn't going to resonate with my people, this initiative, and how can you pivot and turn it into something else? It is an unfortunate characteristic of a program that you do have to keep evaluating. It's a constant cycle of evaluation, communication, feedback and just keeping moving.

**Shaunna Hook:** To add to that, it might also be the timing of when you're launching the program, right? So if you are a financial institution, you might not want to launch a program in Q4 because that's when your employees are the most busiest, they are looking at a bunch of financials, they're getting ready for the end of the year, and trying to get ready for the top of the year so that may not be the best opportunity for you to probably launch a program. And I think, just like Eric said, just re-evaluate your program to see, are you actually getting to the root of what your employees need, and what it is that they want? And I think the champions are a big deal, for sure.

**Adam Primi:** Yeah, I'll answer that as well. We used a wellness committee with wellness champions, and that was extremely effective. One danger in that, I will say, is that you may have some champions who can't continue to be champions for a long period of time. So, as with any program, and I think Eric touched on this, it requires that it's going to be managed. It requires attention. It requires a refresh. It's not a good idea to launch a wellness program if you don't think you have the capacity and commitment to keep it going. It should all fall on the back of one department to make sure the program is running, but you want to make sure that you have broad commitment for it.

I will say, some ways to keep it fresh are to introduce some variety into the program, and you can do that really low or no cost ways. For example, take advantage of the talent that you have on staff. You may have staff who likes to cook. You may have staff that likes to knit. You may have staff that have certain hobbies or interests or skills that they would love to share with somebody else, but they really don't have the opportunity to do it. And sharing those skills, just because it might not fall under say, what you would traditionally define as wellness, for example, healthy food or exercise, it's still a break in the workday to have employees engaged with somebody else over something new and fresh. And so, challenge your mindset around, what you think is wellness and what the staff have to offer.

**Jennifer Morgan:** And just to add to that, in our line of work, we lead with empathy, and the same should be for wellness initiatives or the stalling of them or the difficulty enrolling them out. Remember, if it's not the right time, if your staff doesn't have the capacity to roll out a wellness program, you can always ask, "How are you doing? And is everything OK?" So you can still do the bare minimum in regards to wellness, if the timing is not ideal for you to roll out a full program.

**Atokatha Ashmond Brew:** Here's another question. What are your thoughts about incentives for employee ideas that are implemented by the organization?

**Eric Salyers:** I like using incentives, so long as your culture supports it. I am trying to—my gears are turning fast and furiously here—I'm trying to think if there's any reason why you wouldn't, but incentives are a common motivator in a wellness program. And they can look different ways. I'll try to tie it back to the question in a second. But like I've seen incentives used in a way such as, a very simple wellness program might look like you're utilizing your medical plans bonus platform, and most of them have it. Like Shaunna mentioned, with CareFirst it's called Sharecare. And maybe you're utilizing that, and that's where employees can go out, they can complete a quick little questionnaire and answer some questions, do some quizzes, they get some points, and it's basically participation, right?

And then they can also, maybe you're teaming up with a Walgreens or MinuteClinic. In the Midwest, Kroger has little clinics, I've kind of forgotten now. But you can see the percent of these labs and walk-in places and set up some vouchers where they can do basic preventive lab work that looks at cholesterol and whatnot. And if you do those two items, then you qualify for \$120 premium discount on your health insurance for the remainder of the year. Or I've seen others have maybe have a little bit of a larger goal. Some of these are programs that you can purchase and just plug and play your status. Where you start out at bronze and then, after so much participation you can go up to silver, gold and platinum. I've seen it structured to where if you reach at least gold level by this year, all of next year, then you get a wellness discount on medical premiums.

So as far as incentivizing your staff to come forward with ideas. This is where I wish I could just look at your question and be able to say to help me out. But I guess, I think what you're probably saying is, we would say, "Hey, if you come forward with an idea that takes, we'll give you a \$50 gift card" or something. I don't see a problem with that.

Keep in mind the IRS rules, check with your payroll department on what's considered de minimis. That's a Latin term about whether or not it's got enough value to be taxed, because if you are giving some of these things to employees, you do probably sometimes need to impute income on your payroll. So, I always say it's better to check with your financial status on payroll department before you do that. But I like the idea.

**Shaunna Hook:** Yeah, I think internally, for incentivizing employees to actually participate in the program if you have a wellness program that's built out, you can discount their medical premium internally. So you can have a rule to say, if you go to three health coaching sessions within the program or you go to one coaching session every quarter of the year, then you will continue to have this discount. But the moment you decide that you no longer want to do this, you're going to have to pay the full premium, so that may incentivize employees.

**Jennifer Morgan:** Just finally, you want to make sure that you're following your basic administrative and HR guidelines, that you're applying those incentives consistently, that they're being tracked and that there's some framework, whether it be a policy or a procedure in place that employees can refer to.

**Atokatha Ashmond Brew:** All right. Thanks. Here's another question. Are there questions you think should always be included in a staff wellness survey?

**Eric Salyers:** I hesitate to say always only because when you're structuring a survey of any sort that's going out to staff, you always have to keep in mind that there's going to be a point where you make the survey too large that employees abandon it. And I help, when I go in and do this kind of work with our clients and working with the main stakeholder there, I'm like, think about how maybe you got an email from your favorite vendor and if you complete the survey, you're going to get put into a drawing for a \$500 gift card. I've done it before. You go to page 1, hit next and suddenly it updates to page 1 of 50, so immediately, we jump out of it.

You always want to craft surveys such that you're getting the most information back you can from the least amount of questions. And avoid asking overly simple questions when you can. I'm not a big fan of, "Is our wellness program good or bad?" [but rather,] "What's more important to you, us helping you with your day-to-day work stress or us providing you with incentives to lower your cholesterol?" I'm just spinning off the top of my head. Ask questions that help give you quantitative information that you can then like turn into a decision.

**Adam Primi:** Yeah, that's a really good point and I'll add to that.

I also don't think that there's necessarily any one question that I think you should always have on a survey, but to some of Eric's points, you want to make sure that you're asking the questions to get the information that you want to know. So, for example, don't have a wellness survey to find out how effective your leadership staff is or how well your supervisory staff is listening to employees in general. You want to be—I think the more successful surveys I've found are short and specific, and they're intentional. You know what you're asking for.

And also, be clear about what you're asking for. So, if you're asking a question, for example, it says, "Do you feel leadership supports wellness in the organization?" The term leadership can have a variety of meanings; it could be executive leadership, it could be staff leadership, it could be very direct supervisors. So you want to make sure you're specific about those kinds of terminology, and also about wellness programs in general.

If it's brand new, you may need to provide a definition for what you mean or what we mean as an organization by wellness. What kind of parameters are we looking at? And how are we defining that within the organization? Because not everyone is going to be looking at it from the perspective of the person writing the survey, so try to be as specific as you can about to make sure you're working with as much known information as you can, so you have some context for the responses that you're getting.

**Eric Salyers:** I was thinking more about the question as Adam was talking because when you hear a question and you're on a panel, you try to start talking quickly but your brain doesn't always catch up. Obviously, there's going to be some common denominators through everyone's—like you're going to have some mechanism by which you are saying, "What are the problems that you'll want to see this program help you with? What types of things might you be interested in?" Those I think are pretty common. I mean, that might kind of fit into that answer. Obviously if you're not asking some of those core things, you're kind of missing the whole... You didn't understand the assignment, right?

**Atokatha Ashmond Brew:** Thanks, Eric and everyone. We have quite a few questions regarding BIPOC staff and supporting them, especially during the pandemic and I'm going to summarize them in that how can you create wellness programs and initiatives that highlight and support their needs, considering their specific challenges that they may be facing during the pandemic?

**Jennifer Morgan:** So when you're looking at your BIPOC staff—or I'll go a step further and even say marginalized populations, or even we also, some of us work in this space of vulnerable populations, such as the elderly and disabled—in all of those communities, you want to not assume, just as you would with any other member of your staff, that you know what they need.

When we talk about using a DEI lens in certain areas, certainly, we want to apply that to wellness planning and programs as well. And you don't want to shy away from having that conversation. You may feel that you are not experienced enough to have that kind of conversation or ask the question, or you don't have the expertise, but really, it comes down to just basic leading with empathy and wanting to meet that goal and achieve that need.

As a BIPOC woman myself, I would much rather have someone come to me and say, what do you need in this wellness program as a member of the BIPOC community? Versus someone being too scared to ask me that question, and therefore, just assuming they know what I need. So I'm always about open and honest, transparent communication. If you don't feel comfortable having that conversation, you have someone with DEI experience join you. Have someone as a leader join you in that conversation. Don't single the person out by any means, but I think just facing it head on and making sure that you say, "Hey, I'm not sure if I'm asking this in the right way. If I'm not, please correct me. But I want to make sure that our wellness program is comprehensive and that it's inclusive. What can I do to make sure I'm supporting your needs?" I think that's the best way to go about it.

**Eric Salyers:** Adam mentioned the committee earlier, and it's something I hadn't brought up yet, but it's a wonderful idea, especially if you're going to launch a more comprehensive program to try to bring members in from across various demographics and so forth. But making sure that you've got really good, diverse representation in that committee, and have that committee be part of the body that's helping to generate ideas. That could help just to ensure that there's a seat at the table for that particular group of individuals as well, as an idea.

**Atokatha Ashmond Brew:** Thanks, everybody. Here's another question.

How can we promote flexibility or hybrid schedules with the required work schedule for employees to support clients during set hours?

**Jennifer Morgan:** Go ahead, Shaunna.

**Shaunna Hook:** Yeah, I think the way that you can possibly do that goes back to what Eric was saying. Maybe doing somewhat of a compressed work week, a little bit, right? So, where you're working eight hours a day, Monday through Thursday, but then also, in addition, working with your team. So, if I'm going to work Monday through Thursday this week, maybe Eric, in that same week, is working Monday through Friday to help me out as a team. And then the following week... because I am adhering to what is needed to be done for clients and I have support from my colleagues, and then vice versa, we're leaning on each other to get the work done.

**Eric Salyers:** Those scenarios are challenging, for sure, especially if the individuals are working in like a public-facing type of capacity. You are going to have more challenge there. But let's sit down and just try to think through, like I've been really happily surprised by some of the unique things I've seen. It's true, necessity is the mother of invention. Some of these things I haven't heard before, I'm like, "Oh, wow this is really cool. I wouldn't have thought of this."

Just sit down, and really live in it for a little bit and decide if there's some way that you can still meet your business needs by promoting some of that flexibility. We certainly don't discount that that's a difficult challenge, but I think there's an option there if you put your mind to it and just explore it really well.

**Jennifer Morgan:** Sometimes, there's not an option. Sometimes you do all of the exploring and there still is not a way to implement as much flexibility as you'd like. That's OK, but you need to be sure that you're also communicating transparently. Just like with anything, HR professionals, we always stress, don't just say no, but also give the whys behind it. So just acknowledging that you've looked into it, that you've explored all the different areas to try and achieve it, and it can't be done at this time, goes much further than just as simple no. So, if it's not achievable, be sure that you're transparent about all the exploring that you've done because just seeing that effort goes a long way.

**Adam Primi:** Yeah, I think listening is very important in those situations.

I mean, it might need to go without saying, but in order to make sure that you're responding effectively to concerns, make sure you're listening to new ideas and being open to those ideas. Some folks may not understand the reasons why something is the way it is, but also sometimes things are the way they are just because they've always been that way. It could just be as simple restructuring of business process in order to give greater flexibility to an individual, that could allow that change to happen. So, again, make sure you're listening to ideas from people that are living the work every day, from the frontline staff who are engaging in the work every day.

**Atokatha Ashmond Brew:** Thanks, everyone. We have time for just a couple more questions.

Here's the next one. What's the best way for senior leaders to support and model wellness in the workplace?

**Shaunna Hook:** I think Jennifer touched on one of the best ways in the very, very beginning, which is don't send emails late at night. I think that's one of the ways. Don't send emails late at night and say that you don't expect for your employee to answer. Because someone at a lower level trying to prove their worth and trying to pave their way in the organization might feel inclined to just go ahead and respond because they're like, "Oh, my manager emailed me. I have to do this now." When in all actuality, it could probably wait till the next day, right?

I'd say if there is PTO and you, as senior leadership, if you're not taking your PTO, you might want to because that will encourage employees to actually do the same exact thing...of it being OK to take breaks and taking a mental health day.

**Jennifer Morgan:** Another thing is, be sure you're verbalizing it in front of your other staff. Adam talked about wearing overworking as a badge of honor, so when you have that staff member say, "Oh, my goodness, I logged in Saturday and Sunday, and I've been here since 6 a.m.," say, "Thank you. I appreciate your commitment to our mission. I appreciate it, but I don't want you to do that. Let's talk about ways that we can better prioritize your time or other resources we have or some things that maybe we could take off your plate for now." So really verbalize it when you hear it yourself. Thank them for their, of course, service and commitment to the organization, but let them know that's not the expectation.

**Eric Salyers:** I would say, walk the walk. I mean, if you're going to say that you do it, make sure you definitely do it. And if you have reflected upon your culture and with your fellow leaders, and you're like, "Hey, we are perpetuating this cycle," and it may be unknowingly, habits become habits quickly. If you decide you're going to embark on an initiative to improve that, you need to make a very intentional decision. You need to communicate, "Hey, we've taken a look at ourselves and we're going to do this. We're all in this together," and then truly model and adhere to it. You've got to really buy into it. I can't overstate how much that self-reflection inward, looking at your practices, your culture. And I'll give you an example.

Part of the work I do is a benefits assessment. I'll go in and I'll take a look at an organization's benefits assessments, compare them against the market and then give them recommendations. And when I go into that type of work, I ask upfront, "What do you think your problem areas are?" And from time to time I'll hear, "We need to take a look at our annual leave or PTO program" or something of that sort. I'm like, "OK." As part of my work, if the client has the bandwidth to do it and they want to take on this extra amount of work, I'll do either of a small focus group or a survey, because just like in the wellness side, getting that feedback from employees is crucial. And so often, what I find, it's not the program that has the problem. It's the culture.

And I tell Shaunna all the time, I'm like, "We can design and help employers design the most awesome time off program." If your culture is one of overwork, if your culture is the one where it's more common to re-allocate work if somebody leaves versus getting a new headcount, again, if you've got those kinds of things going on and employees just simply feel like they can't do it, that's the problem. That's not your time off problem. Some of the comments I hear back are like, "I feel guilty if I take this day off, because I know that day is the day Shaunna has to be my backup and that makes her day really hard." Or, "It's the time of year where we feel like we have to jump right away to get this funding. Otherwise, we're going to miss it." Coach your expectations, that's a huge thing.

**Atokatha Ashmond Brew:** All right, and our last question has to do with going beyond mental health support and healthy snack programs. And the attendees are asking for examples of promoting wellness within a culture that has worked.

**Jennifer Morgan:** I know one instance that I dealt with recently is just showing more support in the childcare strain that many parents are going through right now. And so, whether that's adjusted childcare hours or not being able to make a certain meeting or event due to lack of childcare, those are some ways that I've seen communicated a lot more than they were pre-pandemic. And maybe not everyone will accept that support offer, but they'll at least know that it's out there if it does ever impact them. So, that's something unique that I've seen recently.

**Eric Salyers:** Yeah. I'll tie back to the most common things I've seen that I feel like have been relevant to what we've been going through the past two years, the work-life balance perks. I come back to that organization that was progressive enough to say, "Every other Friday, you can have off." I think that was an amazing nod towards employee mental health. And, I also think it's very doable. I mean, I get it. You might have some roles that are public facing, that's going to be much harder to do, and, if you do, you do need to be thinking about equity. Don't design something where some of your employees can't get it. But if you can, most organizations by Friday afternoon, everybody's kind of got their mind on the weekend already, so I really think that's something you could slide right into.

But I've seen that as what I feel like I've seen employees respond to the most, just having that extra space because we're still—even though we've been doing it for a while—a lot of us are still just trying to figure out those boundaries. And, it seems like it still keeps evolving a little bit.

**Shaunna Hook:** I'm sorry, Adam. Do you want to go ahead?

**Adam Primi:** No, go ahead, Shaunna.

**Shaunna Hook:** Just to kind of piggyback off of what Jennifer was saying about childcare, I'm also seeing employees go out and put together a list of tutor services for children or for parents who have children to help them out. Because we're talking about work-life balance here and in the beginning, it was definitely a challenge for everyone to figure out, how am I going to work and ensure my child is receiving the education that is needed? And so, one of the solutions was to just provide some tutoring services. I just saw a lot of organizations putting together those services and making it available for employees to reach out to them.

**Eric Salyers:** The final one that I've seen, then I'll be done, I'm sorry.

I've seen an uptick in meals, and I've been getting hit. My inbox is flooded from DoorDash and Uber Eats, all of those, because they just see my LinkedIn profile, and they knew I used to do in-house, so they're assuming I'm still designing benefits for my own in-house employer. So I frequently get hit by that, but I think that's pretty cool.

I know our own firm here has provided us with vouchers to acquire meals when we have meetings at times and that's something that was really around before the pandemic that I think is really appreciated. It's like, I'm sitting in my kitchen right now, right? It's kind of great to just be done with work and know that I can do DoorDash versus have to go over there and get everything going on.

**Adam Primi:** Yeah, I think everything everyone mentioned is very important. One of the things that I think about, too, is just respect for new boundaries that have occurred as a result of the pandemic.

For example, maybe we're working from home now, we are working remotely now, so the commute is gone. We don't have that stress of having to drive office maybe 20-30 minutes today. But for some people, that was an opportunity for them to have a little bit quiet time. It was a space between the children, and the workday when they listen to a book. They know they're going to be sitting in traffic, where they can enjoy a podcast in the car. That's something that we have to remember that people need and having these boundaries changed where the lines are now blurred and maybe they don't leave the house all day long like they used to. Having some healthy respect for that and giving employees the space to breathe a little bit and give them those needs could make a world of difference in their days.

**Atokatha Ashmond Brew:** Thank you so much, Adam. Thank you, Jennifer and Eric and Shaunna. Thank you all for such a great panel discussion today. We want to thank our participants for tuning in today. That's all the time we have for this discussion.

Remember, we have many other events coming up. You can look at [nonprofithr.com/events](https://nonprofithr.com/events) to see what's on the horizon. Please also be sure to complete the feedback survey that will pop up once this webcast has ended. We appreciate your comments. They help us with planning, and they can inform the topics that we cover as well.

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**Eric Salyers:** Thank you.

**Jennifer Morgan:** Thank you.