

# The Importance of Well-Being Programs

*What Are They? Why Do You Need One? And How Do I Build One That Works For My Business?*

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# The Importance of Well-Being Programs

## ***What Are They? Why Do You Need One? And How Do I Build One That Works For My Business?***



## Jarrett Green, Niki Schaefer & Diane Averell

# OPENING SELF-REFLECTION

Live  
Anonymous  
Polling



***Think of your highest stakes project from last week.  
Pick a word describing your level of stress or mental/emotional  
state as you were completing the project.***



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**Think of your highest stakes project from last week. Pick a word describing your level of stress or mental/emotional state as you were completing the project.**

① Start presenting to display the poll results on this slide.

# Why do our organizations need a well-being program?

Let's start with a “real life”  
experience that will shed  
some light . . . .



# The Short Answer . . . .



The Short Answer . . . .

# MORALITY & MONEY

# MORALITY

## The Legal Industry Continues To Face Dire Mental Health & Well-Being Statistics



The combined levels of stress, anxiety, depression, substance abuse, and suicide likely render the legal profession *the* most troubled profession



## Increased Employee Well-Being Improves Recruiting, Retention, Employee Performance, & Cost Savings

- Approximately half of employees across studies say an organization's culture is more important than compensation when it comes choosing a job
- A 2022 Thomson Reuters Study found that salaries continue to increase in the legal industry since 2021, yet retention continues to plummet
- The 2022 TR study found that lack of well-being was a major driver of attrition at law firms (30%) – not far below inadequate compensation (41%)
- Burned out employees are 260% more likely to search for a new job
- Research by SHRM indicates that replacement costs are typically 50-60% of the employee's salary, so replacing an employee making \$60,000 per year will cost an additional \$30,000 to \$36,000
- Employee workplace stress costs U.S. employers over \$300 billion per year in increased (i) healthcare costs, (ii) absenteeism, and (iii) performance mistakes [American Institute of Stress]



# The Stress-Cognition Loop

**Stress & Underperformance**



**Resilience & Greatness**



# So what does an effective well-being program consist of?

- ① Individual Components
- ② Systematic Components

# Individual Components

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# Cognitive Techniques

*"I am nervous  
and need to  
calm down!"*



*"I am excited  
and fired up!"*





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**When I am about to speak/present publicly and feel stressed about it, I sometimes try to get myself to calm down or tell myself to be calm.**

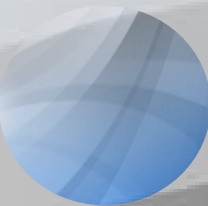
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Dr. Alison Wood Brooks (Harvard Business School)

- Try to calm down: *"I am calm"*
- Try to feel excited: *"I am excited"*

***Niki: How do you use cognitive reframing to help yourself and your team members improve well-being, resiliency and performance?***



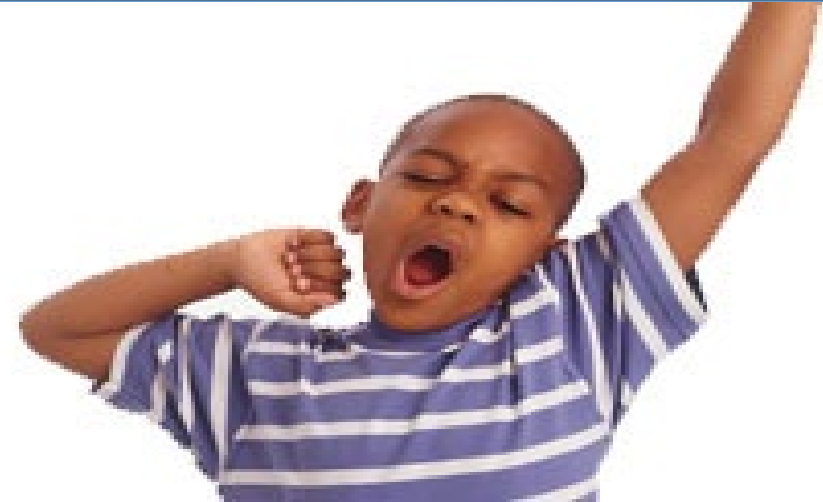


# Behavioral Techniques

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*Take **Non-Intellectual** Short Breaks*



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**During my typical 5-30 minute work breaks throughout the week, I regularly partake in the following activities (check all that apply):**

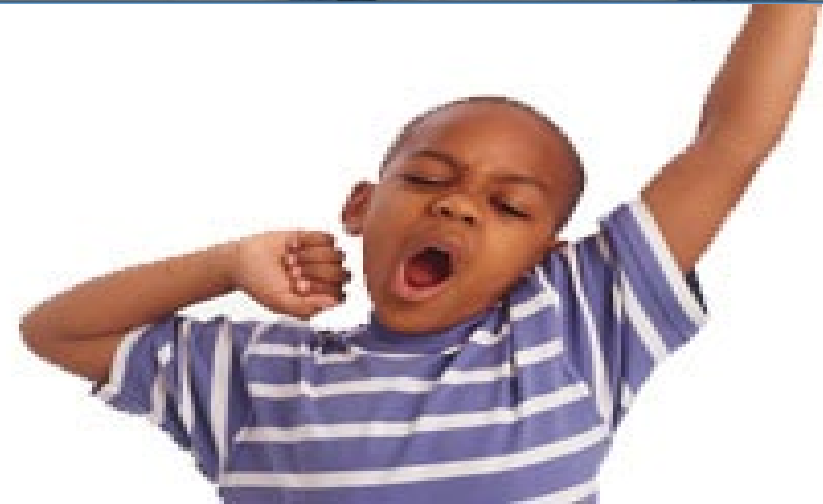
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# Behavioral Techniques



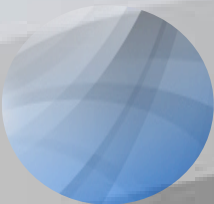
*Take **Non-Intellectual** Short Breaks*



# Systematic Components

***Diane: As a leader and member of your firm's management committee, why do you think it's important to incorporate well-being into the firm's systems and structures?***

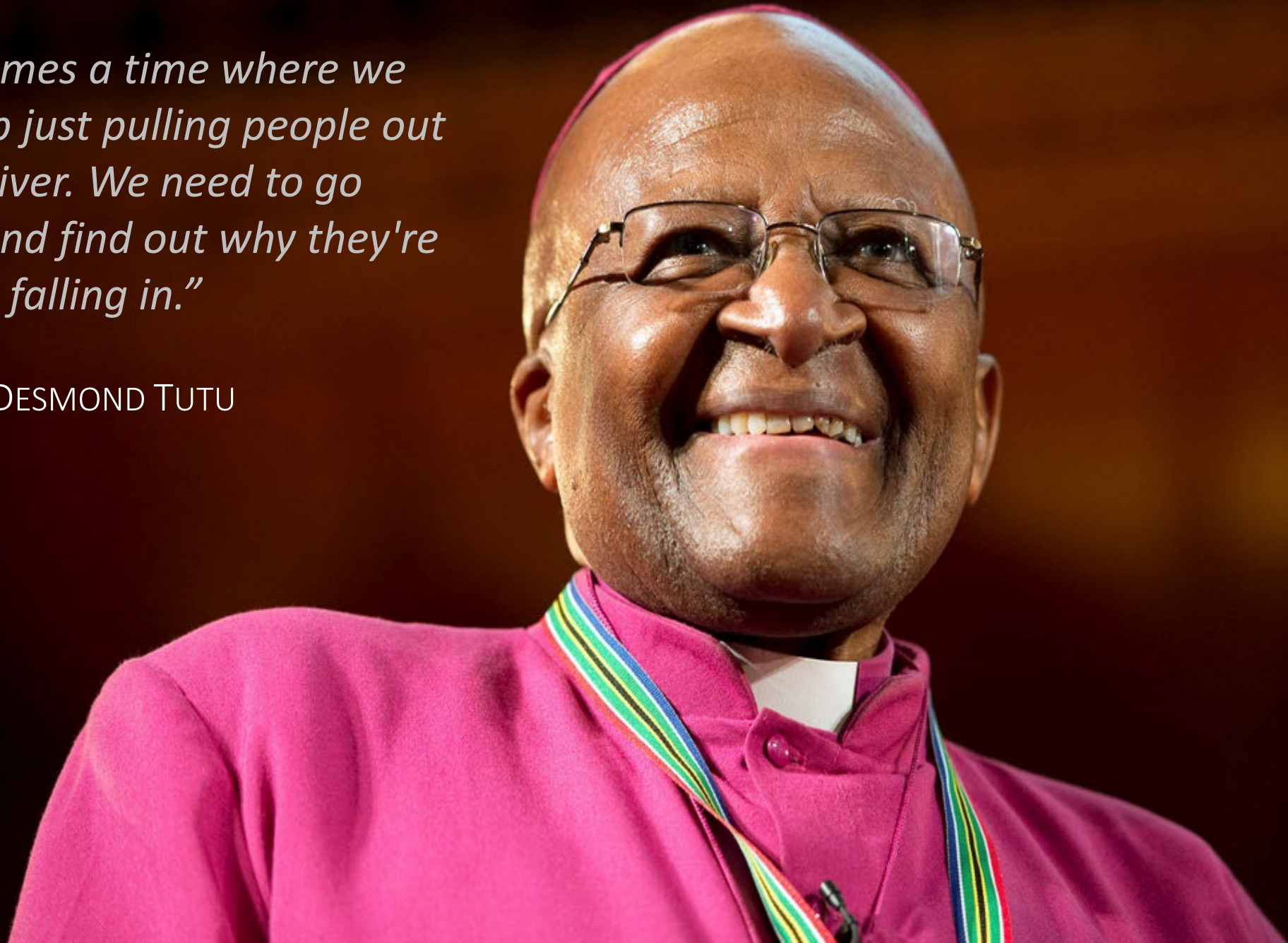
***How's that process going at Porzio?***





*“There comes a time where we need to stop just pulling people out of the river. We need to go upstream and find out why they're falling in.”*

◆ DESMOND TUTU



# 7 Actions to Take at the Systematic / Structural Level to Build a Well-Being Program with Teeth

- ① Written Well-Being Plan
- ② Employee Survey and Baseline Assessment
- ③ Quarterly Theme with a Repeated Structure of Offerings
- ④ Identification of One Annual Goal on an Objective Metric having Well-Being Implications
- ⑤ Incorporation of Well-Being into the Recruiting, Hiring and Onboarding Process
- ⑥ Incorporation of Well-Being into Performance Reviews
- ⑦ Upward Reviews that account for the Leader's Ability to Enhance the Well-Being-Cognition Loop

*Rapid  
Fire!*



# 1

## Written Well-Being Plan

- Well-Being Mission Statement
- Articulation of what well-being means at your Org
- 4-5 “Well-Being Core Values” with single sentence elaboration of each



**Mission Statement:** [Our WBP] is an inclusive, whole-person approach to well-being for each member of the global [law firm] team. Our goal is to lead with empathy, encourage self-care, and meet the unique well-being needs of our people through compassionate support, accessible resources and evidence-based education.

**Vision Statement:** Together we are stronger, more resilient, and empowered to thrive personally and professionally.

### **Well-Being Core Values:**

1. **TOGETHER:** Build on our teamwork culture at [the firm] by providing opportunities for peer-to-peer engagement and connection through various avenues including our Wellness Champions network.
2. **ENCOURAGE:** Encourage healthy habits and preventive care by providing multi-faceted, evidence-based resources that encompass physical, social, emotional, intellectual, financial and spiritual well-being.
3. **EDUCATE:** Reduce the stigma related to mental health and substance abuse challenges by raising awareness and providing education on these issues.
4. **SUPPORT:** Provide a safe and confidential space for our lawyers and professional staff to seek help and support.
5. **LEAD:** Set the standard for a culture of well-being within big law through empathetic leadership, innovation and best-in-class programming informed by team member insights and firm goals.
6. **CONNECT:** Promote informed best practices and collaborate on health and well-being initiatives with our clients, the legal industry, and within our communities.



# Employee Survey and Baseline Assessment

*"You cannot change  
what you cannot...*

**SEE."**

Employee Satisfaction Survey					
	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree
1. I can see myself working here in five years.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I have a clear understanding of my company's strategic goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. I can easily see how my work affects the company's overall success.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. I always know what is expected of me when it comes to my goals and objectives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. It really feels like everyone is on the same team at my company.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. My manager recognizes my full potential and capitalizes on my strengths.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. I always want to give my best whenever I'm at work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. I'm proud to be part of this company.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. I always recommend my company to others.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. The leaders of my company really know what they're doing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. I believe in my company's mission.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## 2 Glorious Options for creating such a survey!!!





## PROMPT:

“Identify 30 questions to include with a likert scale in an employee well-being survey that measures their mental health, emotional well-being, stress resiliency, and positive/negative feelings about the organization”



ChatGPT



### **Mental Health:**

- 1.On a scale of 1 to 5, how would you rate your overall mental well-being currently?
- 2.To what extent do you feel able to manage and cope with stress at work?
- 3.How often do you experience symptoms of burnout, such as fatigue or emotional exhaustion?
- 4.How satisfied are you with the support provided for mental health concerns in the workplace?
- 5.Do you feel comfortable discussing mental health issues with your supervisor or colleagues?

### **Emotional Well-being:**

- 6.How often do you feel a sense of accomplishment or fulfillment in your work?
- 7.To what extent do you feel your work aligns with your personal values and goals?
- 8.How well do you think your immediate work environment supports a positive emotional state?
- 9.How satisfied are you with the recognition and appreciation you receive for your work?
- 10.How often do you experience positive emotions like joy and satisfaction during work hours?

### **Stress Resiliency:**

- 11.On a scale of 1 to 5, how well do you handle unexpected challenges or setbacks at work?
- 12.To what extent do you feel that your workload is manageable and reasonable?
- 13.How supported do you feel by your team and supervisors in times of increased workload or pressure?
- 14.How well does your organization promote a healthy work-life balance?
- 15.How often do you engage in stress-reducing activities outside of work?

### **Positive/Negative Feelings about the Organization:**

- 16.How satisfied are you with the organizational culture and values?
- 17.To what extent do you feel your contributions are recognized and valued by the organization?
- 18.How well does the organization communicate changes that may affect your job or work environment?
- 19.How satisfied are you with the opportunities for professional growth and development provided by the organization?
- 20.How likely are you to recommend your organization as a good place to work?

### **Overall Well-being:**

- 21.On a scale of 1 to 5, how would you rate your overall job satisfaction?
- 22.How often do you feel a sense of purpose or meaning in your work?
- 23.How supported do you feel in maintaining a healthy work-life integration?
- 24.To what extent do you feel connected to your colleagues and the broader workplace community?
- 25.How well do you think your immediate supervisor supports your overall well-being?

### **Stress Management Programs and Resources:**

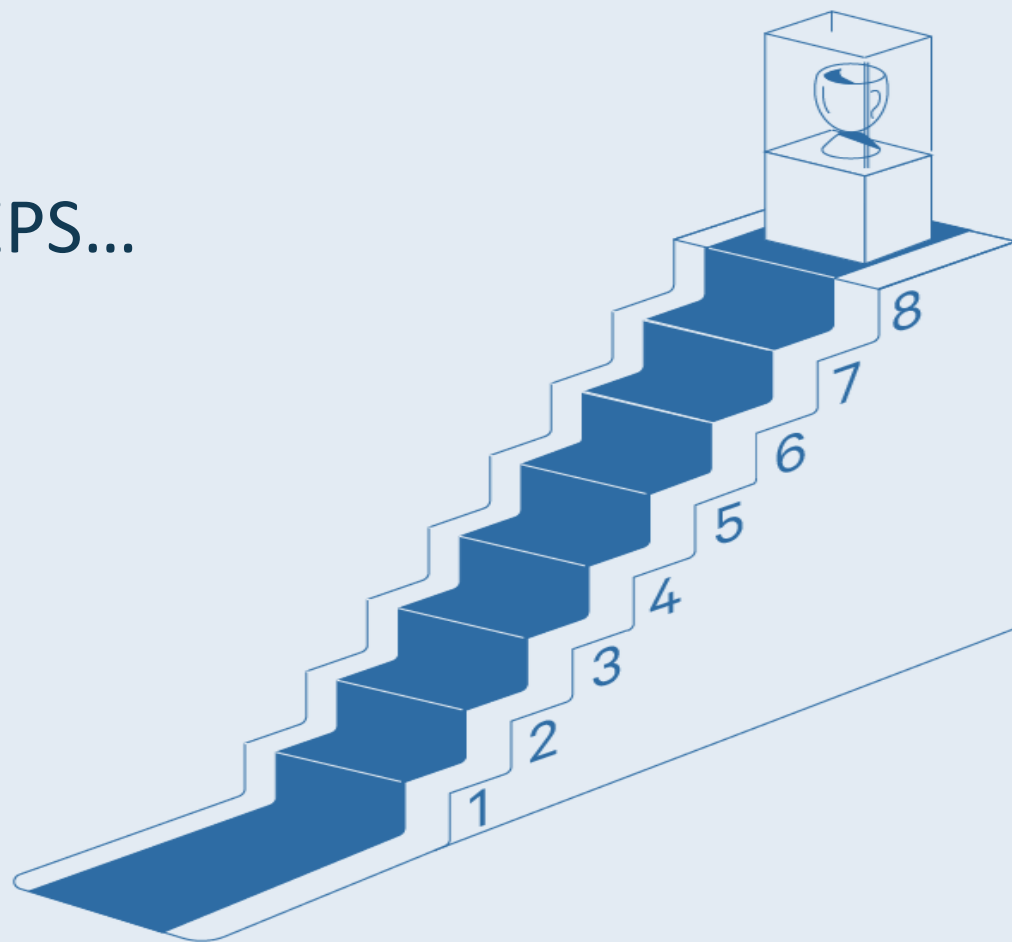
- 26.How aware are you of the stress management programs and resources provided by the organization?
- 27.To what extent do you find the existing stress management programs effective?
- 28.How likely are you to utilize available resources for mental health support?
- 29.How satisfied are you with the accessibility and effectiveness of employee assistance programs?
- 30.How well do you think the organization fosters a culture of well-being and mental health awareness?



# 3

## Quarterly Theme with Repeated Structure of Offerings

BABY STEPS...



*break your  
well-being plan  
into bite-sized  
pieces*



- ✓ **Break up the year into quarters**
- ✓ **Create a quarterly theme**
- ✓ **Provide the same set of offerings each quarter**



# SAMPLE

**Q1: Well-Being & Psychological Safety**

The Pathway to Emotional Thriving  
and Professional Greatness

**Q2: Mindset Mastery**

Framing Challenges and Stressors in  
Ways that Maximize Resilience and Cognition

**Q3: Behavioral Hacks**

Small Behavioral Hacks to Elevate  
Well-Being and Performance

**Q4: Interpersonal  
Communication**

Effective Communication to  
Advance Culture and Performance



# Quarterly Offerings

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- 1) Foundational presentation
- 2) Quarterly interactive session (casual discussion/exploration)
- 3) Quarterly leader interview or panel (modeling & destigmatization)
- 4) Monthly organization-wide well-being email (substantive content, techniques or inspiration)
- 5) Quarterly organization-wide email from a top leader  
(on importance of each theme from leadership's perspective)
- 6) Quarterly organization-wide interactive well-being challenge  
(i.e., 1 interactive challenge/quarter on designated theme)
- 7) Quarterly Resilience Awards (select and honor a small group of awardees each quarter, e.g., 5, that most exemplify and model the values of that month's theme)



# 4

## Identification of **1 Annual Goal** re ***Objective Metrics*** Having Well-Being Implications

- ☐ Resignations within first year or two at organization (trends over time)
- ☐ Other resignation figures to analyze, in comparison with target ranges or industry norms
- ☐ HR claims and other internal assertions/disclosures by current or former employees with wellness-related working conditions
- ☐ Lawsuits, EEOC & state employment claims by current or former employees regarding wellness-related working conditions
- ☐ Employment disability and workers compensation claims with wellness-related components
- ☐ PTO or other voluntary-absenteeism data with wellness-related components
- ☐ Health care data, such as premiums and any non-HIPAA reporting data relevant to wellness
- ☐ EAP data and utilization across core EAP categories and benefits



# 5

## Incorporation of Well-Being into the *Recruiting, Hiring & Onboarding* Process



# Sample Interview Questions

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- Please share a time in your life when you failed at something. Identify how you responded to the failure and anything you learned about yourself or life as a result.
- When you feel stressed, overwhelmed or upset, how do you deal with it? What do you do to relieve yourself of stress or maintain your emotional well-being during challenging times?
- What, if any, emotional well-being practices/exercises do you use in your life?
- How do you intend to balance the intense stressors of this job with your own emotional well-being?
- In your opinion, what is the relationship between happiness and emotional well-being, on the one hand, and professional success, on the other hand?
- What does "success" mean to you? What will it mean to be a "successful" at this firm and in life?





# 6

## Incorporate Well-Being into *Performance Reviews*



# Well-Being, Emotional Intelligence, & Interpersonal Communication

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- Implements a commitment to your own mental health and emotional well-being in ways that ensure your long-term thriving as a human and professional
- Applies a growth mindset where mistakes and errors are converted into growth, improvement and greater mastery over time
- **Demonstrates an attitude of resilience and grit during difficult stretches of work**
- Interprets new challenges and difficult assignments as opportunities for greatness/growth, rather than as threats of failure
- **Displays the courage to ask questions, while recognizing when to engage in self-directedness**
- Seeks out and embraces assignments/projects outside your comfort zone, rather than avoids them from fear
- **Collaborates with colleagues who you disagree with or had prior conflict / difficulties with**
- Expresses disagreement / objections with respect and professionalism
- **Proactively communicates personal boundaries with a collaborative and respectful spirit [upward communication]**
- Maintains a curious mind and humble heart in working with individuals from different identity backgrounds than you





# LEADERSHIP

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- Leads others in ways that build engagement, motivation, resilience, well-being, commitment to the firm, and loyalty to you
- Creates a psychologically safe environment for the team
- Manages conflict with team members effectively
- Uses varied communication approaches with different team members, based on their unique personality and emotional needs
- Balances effective oversight with catalyzing a sense of autonomy and self-directedness
- Holds team members accountable while simultaneously displaying empathy and understanding for their obstacles
- Improves leadership skills over the course of the year



# Implement Upward Reviews that Account for the Leader's Facilitation of Well-Being

**ACCOUNTABILITY**



# Some Sample Questions

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Please identify the 3-4 leaders you do the most work for, and answer the following questions for each one:

*[If you already discussed a leader in the “best” or “worst” section above, please skip that partner during this section]*

**Overall Leadership abilities: 1-10** [1 being “poor” and 10 being “exquisite”]

Insert “checklist” of the leader’s 5 most defining leadership traits:

**When I work with this leader, my quality of work and professional performance:**

☐ are higher

☐ are typical

☐ are lower

*[as compared to my typical quality and performance at the organization]*

**As a result of working with this leader:**


☐ I am more likely to eventually resign from the organization

☐ I am more likely to voluntarily stay at the organization

☐ There will be no effect on my likelihood of resigning or voluntarily staying at the organization

**Please feel free to add any additional comments or explanations:**





*“It is not the strongest of the species  
that survives, nor the most intelligent.  
It is the one that is most adaptable to change.”*

◆ CHARLES DARWIN

# STAY IN TOUCH



**Niki Schaefer**

Vice President and General Counsel  
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