



Wellbeing as Workplace Culture:

A Brief Examination of one Firm's Approach to Changing its Landscape of Wellbeing

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DISABILITY

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PROGRAM FOR DISABILITY RESEARCH

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America is suffering. COVID-19 and its aftermath, economic uncertainty, civil unrest and a heightened sense of inequality in our society are bringing trauma to many Americans. According to a report by the medical journal Lancet, rates of depression have risen by 28% as a consequence of the pandemic, and anxiety has increased by 26% over pre-pandemic levels.

Because 60% of the population is working, these issues manifest themselves in the workplace. In a 2021 American Psychological Association survey, nearly 3 in 5 employees (59%) said they have experienced negative impacts of work-related stress in the past month.

Another report, this one by the Surgeon General, notes that 76% of US workers reported at least one symptom of a mental health condition since the pandemic began; 84% of respondents said their workplace conditions had contributed to at least one mental health challenge.

And according to a report by Mental Health America, 71% of employees found it difficult to concentrate at work, compared with 65% in 2021 and 46% in 2018.

Industry pays the price. Poor mental health and stress are known to negatively affect employee job performance and productivity, engagement with work and communication with coworkers.

Lost productivity, absenteeism, having to recruit and train employees due to high turnover, and even higher health insurance costs are all consequences of poor employee mental health. Projected over a 12-month period, workers with fair or poor mental health are estimated to have nearly 12 days of unplanned absences annually compared with 2.5 days for all other workers, and mental health issues in the US workforce cost employers \$47.6 billion in lost productivity each year.

¹ "The Lancet: COVID-19 pandemic led to stark rise in depressive and anxiety disorders globally in 2020, with women and younger people most affected," Institute for Health Metrics and Evaluation website, www.healthdata.org/news-release/lancet-covid-19-pandemic-led-stark-rise-depressive-and-anxiety-disorders-globally-2020, 8 October 2021.

² "The American workforce faces compounding pressure: APA's 2021 Work and Well-being Survey results," American Psychological Association website, www.apa.org/pubs/reports/work-well-being/compounding-pressure-2021.

³ "Workplace Well-Being," Office of the U.S. Surgeon General website, www.hhs.gov/surgeongeneral/priorities/workplace-well-being/index.html.

⁴ "MHA releases 2022 Mind the Workplace Report, finds increasing number of employees have difficulty concentrating at work," Mental Health America website, www.mhanational.org/mha-releases-2022-mind-workplace-report-finds-increasing-number-employees-have-difficulty, 12 April 2022.

Perhaps as a result of this public health crisis, worker demands for their employers' attention to their mental wellbeing are escalating. According to the Surgeon General, 81% of workers reported that they will be looking for workplaces that support mental health in the future; and a vast majority (87%) of employees think actions from their employer would help their mental health.

While in the past, many companies and employees may have thought of mental health conditions as something that developed "outside the workplace," these past three years of COVID-19 have made it overtly clear that our workplaces directly affect our mental health in every way. Moreover, it's obvious that a lack of effective structures and support at work, especially for the increasing number of workers with mental health conditions, can affect workers' ability to do their job well. These shortfalls can undermine people's attendance at work, lead to higher levels of turnover, and even prevent people from getting a job in the first place.

While employers recognize the need to address employee mental health and wellbeing, many companies are struggling to find the most appropriate responses. A 2022 survey of 50,000 employees by Mental Health America found that:

- Employees believe only 2 in 5 managers encouraged them to take time off when under stress.
- Only 3 in 5 managers care about their wellbeing.
- While 47% of workers know about their employer's mental health services, only 38% feel comfortable using them.

Clearly the stigma of mental illness still weighs heavily in workers' willingness to disclose their disability and get help. While leadership speaking openly about their own mental health issues is a known contributor to employees' willingness to disclose their mental health issues, only 34% of employees report that their leaders do so.

⁵ "The Economic Cost of Poor Employee Mental Health," Gallup website, www.gallup.com/workplace/404174/economic-cost-poor-employee-mental-health.aspx#:~:text=Generalized%20across%20the%20U.S.%20workforce,billion%20annually%20in%20lost%20productivity, 3 November 2022.

⁶ "Workplace Well-Being," Office of the U.S. Surgeon General website, www.hhs.gov/surgeongeneral/priorities/workplace-well-being/index.html.

⁷ "2022 Mind the Workplace: Employer Responsibility to Employee Mental Health," Mental Health America website, www.mhanational.org/mind-workplace.

According to the National Organization on Disability (NOD) Employment Tracker, a confidential benchmarking survey on workplace disability inclusion practices:

- 95% of employers now have senior leaders who promote mental health initiatives in some fashion.
- 64% of employers now say that they have staff or a senior leader responsible for serving as a mental health ambassador.
- But only 20% of employers require managers to take part in an annual mental health awareness training.

While mental health and wellbeing in the workplace is now clearly becoming a priority for employers, the level of resources and tools needed have not been easily found nor available. Every year, NOD fields more and more questions from employers wondering what they can do to specifically help address mental health and wellbeing for their employees. Clearly, industry is struggling to find solutions to this growing workplace crisis.

That is why NOD teamed up with Rutgers University in 2023 to write this brief about efforts by one large professional services firm, Ernst & Young LLP (EY US), to change the landscape of wellbeing within its workplace culture. It examines relevant academic research and frames the firm's efforts within research-identified effective practices and challenges.

In writing this, we sought to understand the development and implementation of this well-established wellbeing initiative, consider how it compares with research identifying successes and pitfalls related to other employee wellbeing programs, and assist similar organizations in considering methods to pursue effective wellbeing initiatives and programs.

Data for this brief was collected from interviews and quantitative, deidentified data provided by EY US.

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ABOUT NATIONAL ORGANIZATION ON DISABILITY (NOD)

The National Organization on Disability (NOD) is a private, nonprofit organization that seeks to increase employment opportunities for the 60 percent of working age Americans with disabilities who are not employed. To achieve this goal, NOD offers a suite of employment solutions, tailored to anticipate and meet leading companies' workforce needs. NOD has helped some of the world's most recognized brands be more competitive in today's global economy by building or enriching their disability inclusion programs. For more information about NOD and how its portfolio of professional services, Leadership Council and Employment Tracker™ can help your business, visit www.NOD.org.

NIDILRR DISCLAIMER

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ABOUT THE EMPLOYER DISABILITY PRACTICES CENTER

The Rutgers Employer Disability Practices Center, established by the Program for Disability Research at the School of Management and Labor Relations in Rutgers University, conducts research to examine the efficacy and scalability of employer practices to create positive employment outcomes for workers with disabilities. A multidisciplinary team of researchers across multiple universities conducted rigorous studies across five focused projects in collaboration with the National Organization on Disability. The findings of this research provide individuals with disabilities and their employers access to practical, timely, and effective knowledge regarding best practices for employment and career advancement. The knowledge generated from this research is useful to people with disabilities, employers, policymakers, employment service providers, researchers, and disability organizations. For more information about the Center, visit employerdisabilitypractices.org. More information about the Program for Disability Research can be found at smlr.rutgers.edu/pdr.

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This brief considers efforts by one large professional services firm, Ernst & Young LLP (EY US),¹ to change the landscape of wellbeing within its workplace culture. It examines relevant academic research and frames the firm's efforts within research-identified best practices and challenges. The purpose of this brief is to understand the development and implementation of this well-established wellbeing initiative, consider how it compares with research identifying successes and pitfalls related to other employee wellbeing programs, and assist similar organizations in considering methods to pursue effective wellbeing initiatives and programs. Data for this brief was collected from interviews and quantitative data provided by EY US.²

¹ EY is a global organization of member firms, each of which is a separate legal entity. This study applies to the US member firm, Ernst & Young LLP (EY US).

² Seven semi-structured interviews were conducted with six firm representatives over the course of two weeks in March 2023. Interviews were conducted via video conferencing technology and recorded. Transcripts were cleaned using speech-to-text transcription software and coded for themes and categories. De-identified quantitative data (US-only) was provided by the firm. This brief is part of a larger research initiative aimed at employer disability practices. See <https://employerdisabilitypractices.org> for more information.

**This is
not about
struggling.
It's about
thriving,
and it's
about
helping
everyone
thrive.**

—EY US representative

Mental Health and Wellbeing in the Workplace

Employee mental health and wellbeing has gradually increased as a workplace priority over the last several decades, and for good reason. Research has indicated that mental illness, depression, and anxiety are prime causes of work absence, and that work-related factors can maintain or increase wellbeing and mental health.³ Studies also indicate there are organization-level benefits to maintaining a healthy workforce, including increased productivity and lower health care costs.⁴ Some research even points to cultures of health and wellbeing as an indicator of performance in the marketplace.⁵ For over 40 years, EY US has provided tools and resources to support EY employees who might be struggling with mental illness or substance misuse issues. Mental illness is recognized by the World Health Organization as the world's leading cause of disability and is itself categorized as a disability. Within the last decade, the firm's focus has evolved to include decreasing the stigma related to mental illness and substance misuse, creating and expanding wellbeing-related programs and benefits, and building a workplace culture focused on fostering mental health and wellbeing. This evolution, which relies on support from both a top-down and bottom-up approach, considers wellbeing at individual, team, and firmwide dimensions. This brief uses a theoretical perspective based on the concept of universal design to illustrate the “wellbeing is a team sport” approach EY US has adopted and highlights tenets of the design that lead to positive outcomes in workplace culture change.

Universal Design

The concept of universal design is grounded in public space planning and is focused on accessibility. For example, rather than adding elements to existing structures to increase accessibility for people with disabilities, a universal design accommodates all people from planning through execution.⁶ This may include designing with ramps, cutaways, and accessible doorways—designs that make spaces usable by all—rather than steps, physical barriers, and doorknobs—elements that restrict use by certain populations and require modification for accessibility. A ramp is useful not only for people who use wheelchairs but also for people with strollers and those who have difficulty climbing steps.

This principle of accessibility, or designing with all people in mind, extends beyond physical design to the design of policies and services. With that in mind, EY US presents a clear demonstration of this principle in the creation and execution of its wellbeing initiative. Instead of focusing on “fixes” for the specific individuals who struggle with mental health and wellbeing, EY US evolved its practices over time to focus on the general mental health and wellbeing of the entire firm.

³ Redekopp & Huston, 2019, p. 251.

⁴ Langlieb, Langlieb, & Xiong, 2021.

⁵ Fabius & Phares, 2021.

⁶ Preiser & Smith, 2011.

Wellbeing at EY US

Beginning over 40 years ago, EY US offered mental health and substance misuse tools and resources to support employees. However, those policies primarily focused on the individual and were designed to respond to instances of problems. This reactive approach evolved into a more holistic, proactive focus on wellbeing with the development of policies aimed at fostering activities and behaviors that support improved mental health and wellbeing for everyone on an ongoing basis. While continuing to offer individual-level support and resources for those who could benefit from them, the firm has layered on these team-level efforts, reinforcing them with the messaging “wellbeing is a team sport.”⁷ The firm’s expanded focus of promoting wellness at the team level rather than solely at the individual level allowed for organizational change by shifting the firm’s culture in an organic and holistic way. At the firm level, the establishment of a Chief Wellbeing Officer and wellbeing-focused team resources and activities helped the firm embed wellbeing within its business model and organizational culture. Across all three layers (individual, team, and firm), the evolution was supported by both a bottom-up and top-down approach. The following section details the implementation of this evolution.

The firm began with an employee assistance program that included both internal and external support. As early as the 1970s, the firm offered health care benefits to employees that included mental health support and counseling through an internal and external Employee Assistance Program (EAP) that offered no-cost counseling sessions. Like other organizations with similar programs at the time, the EY US EAP experienced low utilization due to societal stigma related to mental illness, substance misuse, and the reluctance to ask for help. However, because the firm employed clinicians internal to EY US in addition to external vendor support, the clinicians understood the organizational culture and were able to offer resources and help that was tailored to the firm’s employees. In 2015, the internal clinicians recognized that although the program usage rates were in line with those of other workplaces, usage rates did not match the overall national estimates of mental health and substance misuse issues. In other words, the data available for national trends relative to these issues indicated that firm-level instances of mental health and substance misuse were likely much higher than the rates of program usage. This made it clear that there was an opportunity to connect more individuals with the resources offered by the firm.

⁷ At EY US, teams are groups of people who come together to collaborate on an internal or client project. Teams vary in size and complexity. Internally focused functional group teams are typically long term; externally focused engagement teams may last only for the duration of a particular client assignment.

De-stigmatization of mental health and substance misuse issues was approached deliberately.

In early 2016, the EY US disability employee resource group (ERG) recognized the need to create more openness around mental illness and substance misuse and better equip EY US people to support one another. The disabilities ERG collaborated with the internal EAP, known as EY Assist, to proactively create awareness of the signs that someone might be struggling with a mental health or substance misuse issue. With this identified need, along with the opportunity to close the gap between resource usage and likely need, the internal mental health clinicians and disability ERG developed a program designed for local deployment that would address those concerns specifically as part of an overarching anti-stigma initiative. This program was designed as locally based, live events that combined storytelling, training, and tools/resources. The events, which were sponsored by the local disabilities ERG and office managing partner, were more proactive than previous efforts and, according to one EY US team member, included storytelling in “an effort to start to destigmatize” the topics of mental health challenges and substance misuse. These initial efforts focused on a “leaders first” model in which partners shared personal stories of their own or family members’ challenges, beginning de-stigmatization of mental health and substance misuse issues, building trust, and normalizing talking about mental health. Events of this type are generally unsuccessful without high levels of organizational trust.⁸ For individuals to come forward and openly discuss personal wellbeing or mental health challenges, trust must be built and fostered. A representative from EY US leadership said the events had high attendance, and the response was so positive it led to further action: “Once it became clear that there was a real appetite [for dialogue like this at the firm . . . we realized] we need to do something much more comprehensive, and much larger, and it needs to be far and wide.”

On-staff mental health clinicians were instrumental in de-stigmatization. In addition to the local disabilities ERGs, the small team of clinicians employed by EY US (the internal EAP) were key drivers of the gradual organizational culture shift. While many firms were shifting from internal to external EAPs, EY US adopted a hybrid model that included both—with full leadership support and backing. A concerted effort to listen to employees, offer education about mental health and wellbeing, and normalize talking about these issues drove de-stigmatization across the firm. As one EY US representative said,

The internal [EAP] team conducted hundreds of presentations and interactive sessions addressing the stigma of mental health and the importance of prioritizing wellbeing. The internal team connected with tens of thousands of EY [US] professionals during the past few years alone, and these efforts led to greater usage of our employee assistance counseling benefit.

⁸ Dirks & Ferrin, 2001.

During the period when the anti-stigma initiative was launched, the same representative noted there was an increase in usage rates of the EAP: “Our program usage, which was flat in the low single digits for 30 years—similar to workplaces around the country—saw its first increase the very same month we began our anti-stigma initiative.”

The anti-stigma initiative led the firm to adopt a broader concept of wellbeing. One participant in a leadership position at EY US, when reflecting on the firm’s early focus on mental health and substance misuse, said, “it felt overly programmatic and not necessarily cultural in the way that we were thinking about it. We were thinking about tools, resources, and programs, but not culture change broadly.” This is a good example of universal design—leadership became aware that focusing on “fixes” to the existing structure was not a tenable way to transform culture. Promoting and fostering wellbeing for everyone requires a more comprehensive approach; in the case of EY US, this meant approaching wellbeing at the team level.

Education at the team level furthered normalization around talking about mental health. An e-learning curriculum was developed in 2016 that focused on normalizing conversations around mental health. Storytelling was embedded throughout the material that highlighted the personal experiences of firm volunteers. A team discussion guide was also developed for teams to use after course completion. Teams would take the course and then meet to discuss the material. In 2018, the anti-stigma initiative evolved to include issues beyond mental health and substance misuse. The content for the courses was expanded to include life events, caregiver struggles, parental transitions, financial challenges, loneliness, relationships, and other topics. In 2019, healthy sleep habits was an additional focus of the firmwide education campaign.

Engagement of the internal EAP team with natural communities within the firm created a sense of relevance around the firm’s wellbeing offerings among employees. The firm’s internal group of EAP clinicians engaged with various departments and groups at EY US, such as the disability ERG, local offices, functional groups, teams, and other communities. This allowed the EAP team to provide wellbeing support tailored to specific communities and needs within the firm, building trust and increasing engagement. Literature discusses multiple benefits of engaging with social networks within an organization to create change. One source discussed social network theory, which argues that “individuals are embedded within social systems that function as reference points for the formation of attitudes.”⁹ In other words, the social systems within which an employee works have a substantial role in determining the employee’s attitudes.¹⁰ If an employee’s social environment (such as colleagues, supervisors, and subordinates) tends to resist a change, the employee is more likely to resist as well.¹¹ But if an employee’s social environment reacts positively toward the change, or feels instrumental in creating it, the opposite can occur.

⁹ Brown & Quarter, 1994; Burkhardt, 1994; Erickson, 1988; and Gibbons, 2004 as cited in Oreg, 2006.

¹⁰ Burkhardt 1994; Gibbons, 2004 as cited in Oreg, 2006.

¹¹ Brown & Quarter, 1994, p. 81, as cited in Oreg, 2006.

The pandemic created new challenges and opportunities. While the COVID-19 pandemic added anxiety and mental health challenges as well as general health struggles for employees of EY US, it also helped normalize talking about wellbeing and mental health. Additionally, working from home created an atmosphere of authenticity that made work feel more personal. One participant said:

You were coming into people's homes on [video conference calls], you were hearing dogs barking, you were hearing children, you were hearing roommates or spouses . . . we saw people's lives in a way we hadn't before, which led to a degree of openness and sharing and authenticity; the walls were down. And that made it easier for people to be more real, including for people to share their fears and their concerns, and some of the challenges they were having.

The firm continued to hold wellbeing events and storytelling throughout the pandemic, shifting to a virtual format that had the unexpected benefit of increasing capacity. Instead of in-person events, which often could not exceed 40 to 50 participants, virtual events suddenly had the capacity for hundreds or thousands of participants. One participant said, “we’ve had webcasts where thousands of people are on, and someone is telling a personal story around the mental health initiative.” Participation in these events increased because of—and despite—the pandemic.

Leadership buy-in increased adoption. In the fall of 2021, EY US created a Chief Wellbeing Officer position to indicate the permanence of its wellbeing focus. As one participant said, “wellbeing is [now] a business imperative [at EY US].” Research highlights leadership vision and adoption as important to successful organizational change.¹² The installation of a Chief Wellbeing Officer institutionalized and reinforced EY US’s commitment to wellbeing at the firm level. Thus, the implementation of the Chief Wellbeing Officer and the firm’s “leaders first” approach helped combine top-down and bottom-up implementation to encourage safe spaces and build trust. A participant noted how instrumental the move was:

Probably the biggest impact was when the decision was made to have a full-time wellbeing officer, to have somebody at a partner level focusing on wellbeing more holistically. . . . Bringing in this role was signaling long-term commitment to wellbeing as an important part of our business strategy.

¹² Oreg & Berson, 2019, p. 284.

Another representative said, “our Chief Wellbeing Officer helped expedite buy-in from our leaders to all of our wellbeing efforts.” The Chief Wellbeing Officer said, “Creation of the Chief Wellbeing Officer role was really a focus on ‘how are we going to transform our culture and our organization with [wellbeing] at the center of it?’ ” Research finds that in complex situations—such as organizational culture change—visible involvement and commitment by leadership can help by “providing structure that is more absent in purely bottom-up approaches.”¹³

Implementing the Team Wellbeing Toolkit began to normalize efforts to increase wellbeing at the team level. The firm’s next transformational endeavor was to create a Team Wellbeing Toolkit—a compilation of resources, programs, and guidelines that teams of employees could choose from to implement. The toolkit was developed early in 2022 and piloted with 24 teams later that year. The pilots were successful, and EY US launched the Team Wellbeing Toolkit firmwide in fall of 2022. By implementing its wellbeing initiative at the team level and allowing teams to choose ways to implement wellbeing in their respective teams, the firm created a level of buy-in from teams and their leaders. Team members were involved in rolling out whatever form of wellbeing actions felt most useful to their individual team, choosing from a set of proposed “norms”—practices to be implemented for the entire team, e.g., keeping Fridays free from meetings or not sending emails after 6:00 p.m. to allow teams to wrap up the workday without interruption—the ones that best reflected their teams’ needs. Research highlights this as an effective practice; one study states that “engaging and involving others in the process of change is more likely to lead to successful implementation of the change.”¹⁴ Other literature states “situational interactions on an issue from the bottom-up result in increased emotional energy, understanding of the topic, and intention to allocate time and effort to the issue.”¹⁵ Again, the concept of universal design is evoked in this practice; teams were able to select and integrate wellbeing practices for every team member. As the Team Wellbeing Toolkit was rolled out across the firm, there was distinct and deliberate buy-in at the leadership level. This led to more awareness and adoption. One team member commented that “there was a trickle down, obviously, when leaders started talking about this.”

Creating wellbeing-focused performance goals and monitoring metrics helped the firm elevate wellbeing in the business. Soon EY US adopted the wellbeing initiative as part of its business model, collecting various wellbeing metrics (both experiential and operational) in one place they refer to as the “Wellbeing Index” and creating specific wellbeing-focused performance goals for partners, principals, managing directors, and directors. These leaders have a formal goal, on which their performance is evaluated, related to (1) how they are modeling wellbeing in their own lives and (2) how they are supporting wellbeing for their teams.

¹³ Burgemeister, Crawford, Hackworth, Hokke, & Nicholson, 2023.

¹⁴ Oreg & Berson, 2019, p. 284.

¹⁵ Soderstrom & Weber, 2020, p. 255.

Focusing on collaboration and empowering teams helped build trust. Trust is a key measure of an inclusive culture. At EY US, a key element of the wellbeing initiative was to engage and empower teams through the Wellbeing Champion role at the team level. This form of engagement has built trust among team members. One individual said:

[The Wellbeing Champion role] was meant to be a little bit more leadership sponsorship than we might have had in the past. I think sometimes, when things are being driven out of HR [the human resources department] they're seen as an HR program. And one of the things we were trying to do by adding the [Wellbeing Champions] role was to have it much more as a co-lead, you know, HR bringing the expertise, but really having business leadership feel like they own it and need to drive it.

Literature discusses organizational change in teams, stressing that “the team level is where strategic goals are translated into an implementation plan.” Mid-level managers must address how they will achieve the goals of the larger change effort with the team(s) they lead: “First, managers must agree to ‘buy-in’ or fully accept the change vision themselves and then be able to inspire others. This requires accurately determining the change impact to their team and diagnosing team weakness and strengths.”¹⁶

The creation of a Wellbeing Champions Network solidified wellbeing at the team level. In July 2022, EY US invited employees to become part of a volunteer network of self-appointed Wellbeing Champions for their individual teams. Wellbeing Champions attend training sessions on the Team Wellbeing Toolkit and other resources, have regular meetings, lead their teams in choosing wellbeing practices, and become resources for team members to discuss wellbeing and mental health. The network carries out the firm’s wellbeing practices but implements them at the team level, where wellbeing can be tackled by the team, rather than individuals. The network also creates a venue for regular dialogue about wellbeing, something that further normalizes talking about mental health.

Literature identifies that new initiatives face challenges when they are focused just on individuals and not at the team or organizational level.¹⁷ The Wellbeing Champions Network, however, was deployed at the team level. One Wellbeing Champion said, “Many people think that team norms and dynamics and how a team works must come from the top down. I think we’ve been proving that is not the case, [because] we’re able to really empower people of all ranks.” In considering elements of universal design, deployment at the team level rather than individual level takes more perspectives into account and thereby helps create a more universal, yet still tailored, approach to wellbeing.

¹⁶ Heckelman, 2017, p. 17.

¹⁷ O’Brien, Flott, Bray, Shaw, & Durkin, 2022, p. 7.

Framing wellbeing within the team created buy-in and accountability. The current focus of EY US is to bring each element of the 40+ years of implementation around mental health and wellbeing together into one overarching focus on wellbeing and to continue to foster a culture of wellbeing and inclusion. The current EY US wellbeing team focuses on emphasizing the importance of wellbeing at work as a team responsibility—wellbeing needs to be an integral part of how work and collaboration happens. The EY US wellbeing team recently developed a framework with four “pillars of healthy work” that together are meant to shape workplace culture and support wellbeing at the team level. The four pillars are: 1) focus, or creating a culture of wellbeing at the team level so team members can focus on their work as well as maintain overall wellness, 2) connections, or a focus on building healthy relationships and connections with team members to increase inclusion and belonging, 3) predictable flexibility, or having intentional flexibility within the team relative to workload, and 4) efficient impact, or effectively collaborating and focusing on the things that have the most impact. The EY US wellbeing team continues to educate leaders and staff members on the importance of these four pillars and supports teams throughout the firm in enabling their adoption through use of the Team Wellbeing Toolkit.

Overall, the firm’s current goal is to institutionalize wellbeing as part of how teams work with one another and to define and redefine team norms and behaviors. Representatives of EY US stress that wellbeing is a permanent part of how employees relate to and interact with each other and that the creation of norms and behaviors that generate wellbeing for all team members has been framed as a team responsibility. This has been encompassed in the firm’s shift to

“wellbeing is a team sport.”

FIGURE 1

Progression of Key Activities in the Institutionalization of EY US's Wellbeing Model



EY US layered its approach to wellbeing over time, beginning with a focus on the individual and later adding a team-level and organizational focus. Early programs/activities focused on de-stigmatization of mental illness and substance misuse, while later programs/activities focused on overall wellbeing. Pivotal in the institutionalization of its wellbeing model was deliberate teaming between the EAP and natural communities within the firm, the ongoing engagement of leadership, including the addition of the Chief Wellbeing Officer role, and the empowerment of teams to influence norms to fit their specific needs.

CHALLENGES

Organizational culture change is difficult. It involves layers of engagement, buy-in, trust, time, resources, and myriad other elements. Organizations must consider risk, exposure, resource investment, and other factors when considering tackling a culture shift. An interview participant discussed how the firm's teams of experts initially approached the idea of encouraging proactive conversations about mental health with caution, especially considering the early mental health and substance misuse live events included storytelling of employees' mental health struggles. One consideration was the role of the organization in employees' mental health and substance misuse: How involved should an employer be in these issues? Is disclosure of sensitive issues something the firm should be promoting? Few organizational precedents were available. Proceeding into relatively uncharted territory was a carefully weighed decision.

The firm was also a successful organization with a well-established organizational culture, which presented potential difficulties for teams attempting to implement norms that would change the way in which work gets done. One participant described the process of change at the firm level, saying “we’ve got a group of people who’ve been highly successful operating one way. And we’re asking them to reflect on how they’ve operated and start operating differently, which is just always really hard to change.” Changing how teams operated was uncomfortable for some who were used to a different way of operating.

Making time for wellbeing can be difficult. Another challenge was intrinsically tied to the firm's success: “People are really busy,” one representative said, noting that it is therefore difficult “to get to them in forums where they’re tuned in and listening and can actually hear it and start to think about what they’re going to do differently.” This challenge is one EY US still grapples with—while deploying resources, norms, tools, and benefits assist culture change, as one employee said, “we need to enable people with time to take advantage of all these things.” Creating virtual events was one way the firm mitigated this issue; it is easier for employees to attend something virtually than it is to attend an in-person meeting. Many virtual events also include an interactive element such as chat or a live discussion, keeping people engaged. Another way the firm encourages employees to prioritize their wellbeing is by offering discretionary funds through a Wellbeing Fund, which allows each employee to be reimbursed for 75 percent of the cost of expenses, up to \$1,000 per year. Employees can use the funds for wellbeing-related purposes including paying for gym memberships, meal services, or health-related mobile apps and websites, which can help them create more time in their day for activities that promote wellbeing.


Staying current and relevant requires constant review. Challenges also surface in the development of apps, tools, and resources: an organization must find tools that work for the population and create cycles of review to assess their usefulness. Monitoring usage and receiving constant feedback are crucial elements of maintaining relevance. For example, the EY US wellbeing team and other firm leaders monitor wellbeing trends alongside operational data through their Wellbeing Index dashboard. This dashboard provides leadership with insights as to the state of wellbeing across various portions of their operations as well as across EY US overall. Additionally, the wellbeing team focuses on data-driven indicators of success in new programs to continue to monitor the effects of specific programs on employees' wellbeing scores.

RESULTS

Success/Impact Metrics

Academic research studying the effects of organizational change highlights several ways to measure impact. These include monitoring employees' awareness and interest in programs/initiatives, normalization of the issue of focus—in this case, mental health and wellbeing—and attendance or usage of the program or initiative. Also important is the ability of the organization to utilize the data to affect change. This section details each research-derived impact measure and discusses how EY US measures it and uses those data to affect change.

Awareness/interest. EY US has dedicated significant attention to its wellbeing initiative and continues outreach at the firm and team level to continue to engage employees. Interview participants discussed the high level of awareness of the wellbeing initiative and resources. One participant said: "I think people love the benefits. They use them. There's so much awareness that we accomplished. People know that we are serious about this." In addition to awareness about the initiative and assorted tools and resources, awareness of issues around wellbeing seems to have increased as well. One participant commented on this, saying:



I think we've done a lot with awareness around what is mental health, what is wellbeing, what is psychological safety, why it's important to not just wait—have an open-door policy and just expect people to come in and talk about mental problems, you have to go out there because a lot of people don't show signs until it's too late.

Another measure of impact for EY US has been interns' and new recruits' awareness of and interest in the firm's wellbeing initiative. This is important for the sustainability and continuation of the initiative. One team member noted that "people want to join a team that has good wellbeing, and people want to work with teams that help them succeed and get better." He went on to discuss an event with interns where the wellbeing initiative was talked about by interns as a firm benefit:

This summer a colleague and I were asked to speak to the interns. We talked to thousands of interns about our benefits, to get them excited about joining the firm. The benefit that was regularly commented on during the sessions while they're with their peers in a room with hundreds of people was our mental health program. So, our mental health programs and our focus on wellbeing has become a recruiting tool.

In addition to the internal EAP team, the firm provides 25 no-cost counseling and mental health coaching sessions per year for each family member in an employee's household—not just the employee—through an external vendor. One EY US representative said, "We recognize that if a family member in the household is struggling, it can impact our employees as well." Benefits such as these have created interest and excitement among potential employees.

Normalization. There seems to be an increased acceptance within EY US that wellbeing needs to be a priority in the workplace. One participant said, "we began to see a real shift when we launched our anti-stigma efforts. Over time, there was less and less discomfort with approaching these issues." Another participant said, "A lot of people are talking about wellbeing." Another said:

In the past, people didn't necessarily feel like they might have had the permission to say, 'we should do this.' They felt like that would have been inappropriate to go to the partner and say, 'should we be talking about our team norms and talking about wellbeing?' And now we're creating an environment where everybody feels like, 'it's actually OK for me to go and have that conversation.'

Another participant discussed this same point, noting that the firm continues to work in this realm:



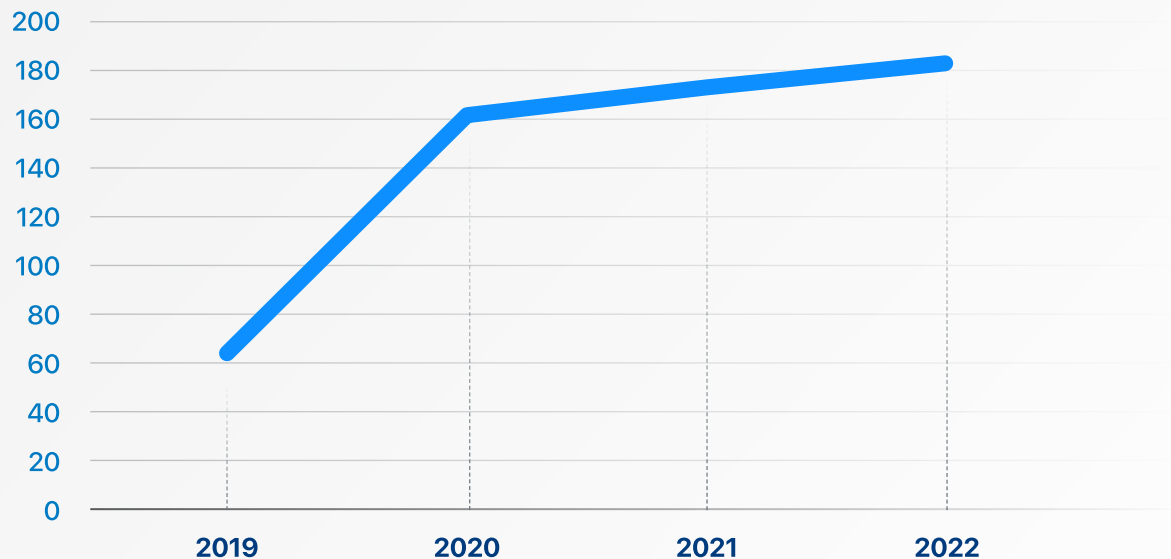
I think the biggest success will be when talking about wellbeing as a team and developing practices in the team that work for that team, just to feel better, to feel healthier, to not feel overwhelmed, to feel more balanced. When that becomes routine, then we'll really have hit where we're headed.



This illustrates the universal design principles of equitable use—allowing everyone to use the practices—and flexibility in use—accommodating a wide range of preferences and abilities.

Attendance/usage. A challenge many firms meet when attempting culture change is maintaining the relevance of the initiative and keeping employees engaged. Metrics are an important part of ensuring engagement and making sure the initiative resonates. In the fall of 2022, EY US created a new webcast series to address current issues that may increase anxiety or stress for its employees, covering different topics throughout the series. One participant commented on attendance, saying: “We’ve had over 28,000 views of these webcasts. And it’s continuing, it’s growing.”

The internal EAP team at EY US continues that momentum, increasing the number of presentations, benefits overviews, professional network meetings, group support, and other presentations each year, growing the number of sessions by 180% between 2019 and 2022 (Figure 2). Across that four-year span, sessions at which the EAP presents have drawn over 80,000 attendees. The EAP team leads these presentations at the request of ERGs, business units, teams, local offices, and other natural communities within the firm, illustrating the benefits of a combined grassroots and human resources department (central) approach in broadening reach and adoption of content.

FIGURE 2**Total Number of EY Assist Presentations and Group Support Sessions by Year, 2019–2022**

The Wellbeing Champions Network has also continued to grow since its creation in summer of 2022; its current membership is over 1,000 employees.

Informing action. Collecting impact measures has limited benefits unless the organization is willing to create action around the information they reveal. An interview participant discussed an example of how wellbeing measures from the firm's Wellbeing Index are used to inform action:



One of our teams had some low wellbeing scores. People didn't feel like they had the time to balance personal and professional demands, and people didn't feel like they had the time to take care of themselves from a health and wellbeing perspective. We were assuming that this team [was] working extensively more hours than anybody else. But when we got into the data, they actually weren't working any more hours. They also were taking time off at the same rate or more than other teams. They were feeling a disconnect between their level of effort and the level of impact. We're trying to enroll a lot more of that team into the Pathway to Purpose program, and we also have a team purpose program to help teams define their purpose together as a team, and we're pushing [the members of that team] to do that team purpose exercise.

Literature indicates employees perceive the meaningfulness of their work relative to three dimensions: 1) perceived significance of work, 2) self-realization, and 3) broader purpose.¹⁸ These three elements combine to help employees find a purpose in their work and a desire to continue working. How employees perceive purpose in their work can directly affect their wellbeing as well as their attitudes toward their work in general.¹⁹

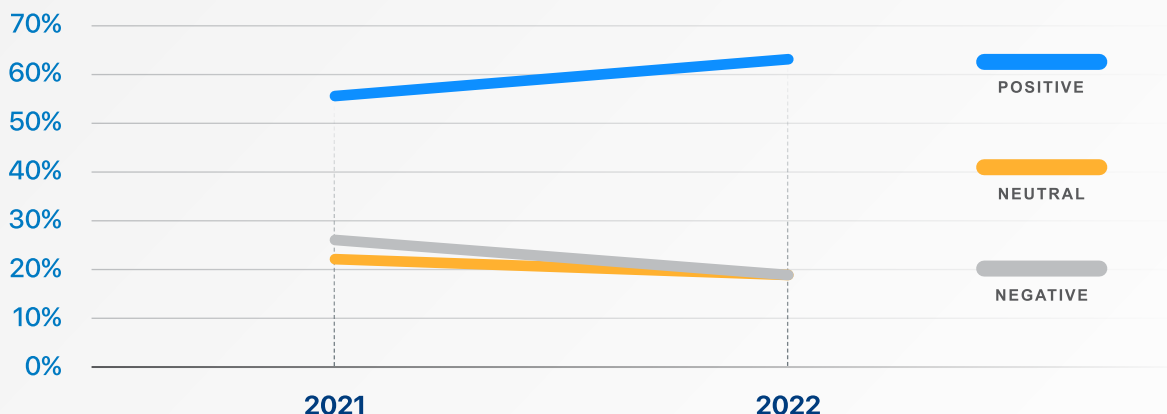
Wellbeing Metrics

The EY US wellbeing team and firm leadership rely on data collected via various surveys to assess the effectiveness of their wellbeing programs and initiatives and to monitor the overall levels of employee-reported wellbeing. Results of these surveys are used to monitor whether employees are experiencing improved wellbeing and feel better able to handle time demands. This section details metrics used to gauge overall wellbeing sentiment and program-level efficacy with data from 2021 through part of 2023.

Overall wellbeing sentiment. With nearly a 50 percent response rate (49 percent in November 2021 and 46 percent in November 2022), the firm's People Pulse survey serves as a reliable check-in for many employee opinions. When asked in that survey whether they were comfortable with the personal and professional demands on their time, the percent of EY US employees who indicated that they agreed or strongly agreed that they were comfortable with those demands increased by nearly eight percentage points between 2021 and 2022 (Figure 3).

FIGURE 3

Trend in EY US Employees' Responses to Survey Question about Comfort with Time Demands, 2021–2022



Source: EY US People Pulse survey

Note: 2021 N=24231; 2022 N=26119. Prompt was "I am comfortable with the personal and professional demands for my time." Positive includes responses of strongly agree and agree, neutral is neither agree nor disagree, and negative includes strongly disagree and disagree.

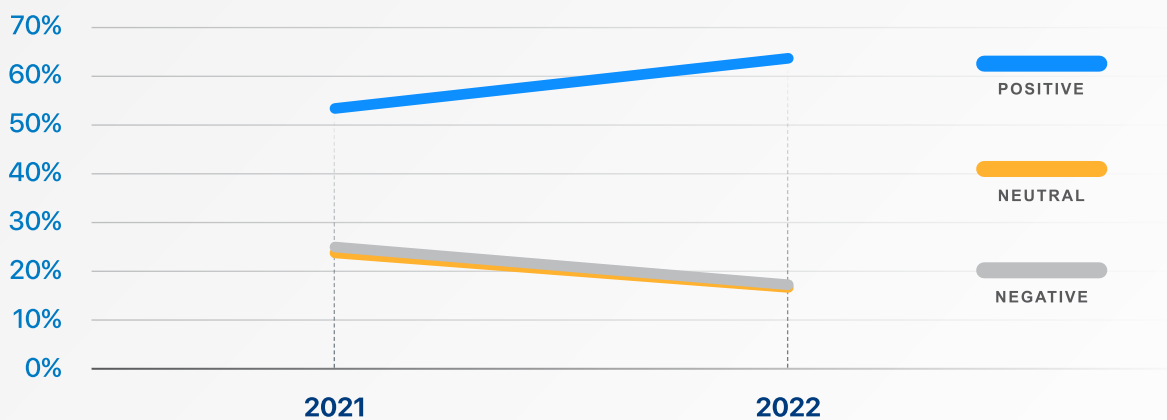
¹⁸ Martela & Pessi, 2018, p.9.

¹⁹ Hill, Almeida, Sin, Turiano, Burrow, 2018, p.52.

In the year between the two surveys, EY US streamlined its People Pulse survey, combining two wellbeing questions from the 2021 version into a single question with similar sentiment, as the two questions had historically similar favorability response rates. The questions asked about employees' abilities to dedicate time to their health and wellbeing needs. Looking at both questions in 2021 and the combined question in 2022, the percentage of EY US employees who responded positively increased by over 10 points (Figure 4).

FIGURE 4

Trend in EY US Employees' Responses to Survey Question about Ability to Dedicate Time to Wellbeing, 2021–2022



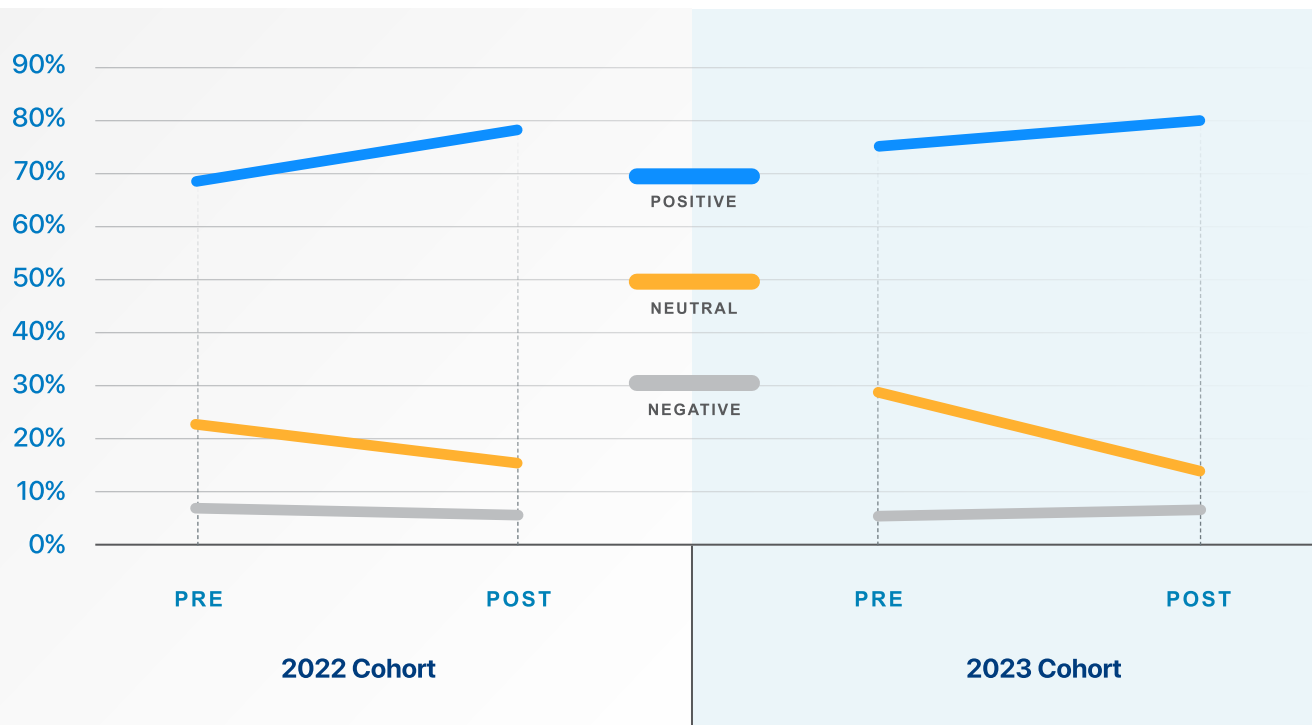
Source: EY US People Pulse survey

Note: 2021 N=48419 (sum of both questions); 2022 N=26119. 2021 prompts were "I am able to dedicate time to support my mental and emotional health needs" and "I am able to dedicate time to practice healthy habits"; 2022 prompt was "I am able to dedicate time to my health and wellbeing needs." Positive includes responses of strongly agree and agree, neutral is neither agree nor disagree, and negative includes strongly disagree and disagree.

Program-level efficacy. The firm also monitors metrics at the program level through multiple means. These metrics are used to gauge the effect of various wellbeing-focused programs on employees' overall sense of wellbeing and to monitor program uptake and usage. Pre- and post-program screenings related to the EY Fit to Perform wellbeing program revealed that the proportion of program participants who responded positively when asked about their ability to experience a level of wellbeing that is right for them at EY US increased by an average of seven percentage points after program completion across the 2022 and 2023 cohorts (Figure 5).

FIGURE 5

Trend in EY US Employees' Responses to Survey Question about Wellbeing Experience Before and After Participation in EY Fit to Perform Program, 2022 and 2023 Cohorts



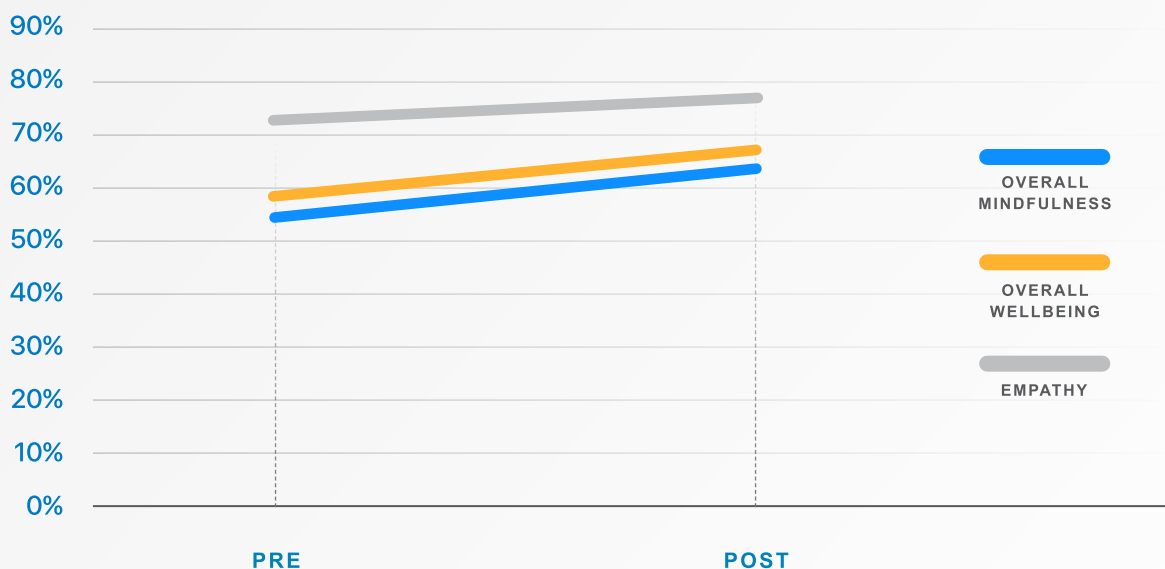
Source: EY Fit to Perform survey (US responses only)

Note: 2022 Cohort - Pre-N=521; Post-N=255; 2023 Cohort - Pre-N=715; Post-N=408. Prompt was "At EY, I can experience a level of wellbeing that's right for me." Positive includes responses of strongly agree and agree, neutral is neither agree nor disagree, and negative includes strongly disagree and disagree.

Another wellbeing program at EY US, Mindful Leadership, also saw improvements in mindfulness, wellbeing, and empathy when comparing program participant responses from before and after the program. Looking at overall scores for the three measures, as a percent of maximum possible scores, the average scores improved by around four to nine percentage points, which represents between 6 percent and 16 percent improvements in mindfulness, wellbeing, and empathy (Figure 6).

FIGURE 6

Average Responses to Mindful Leadership Measures by EY US Employees Before and After Participation in Mindful Leadership at EY Program, 2021 and 2022 cohorts.



Source: EY US Mindful Leadership at EY Program Surveys

Note: N=648 ; Data shown represents the key questions from a larger survey to measure the impact of the Mindful Leadership program. The data includes six questions related to mindfulness, 13 questions related to wellbeing, and one question related to empathy. Responses to Mindfulness and Wellbeing questions were on a 6-point scale and Empathy was on a 5-point scale, with scores above representing average response as a percent of the maximum score (e.g., score of 3 on 6-point scale is 50%). Responses were coded such that higher scores represent higher mindfulness, wellbeing, and empathy. 'Pre' refers to responses collected before the program and 'Post' to responses collected at the end of the program.



The greatest improvement was seen in the wellbeing prompt

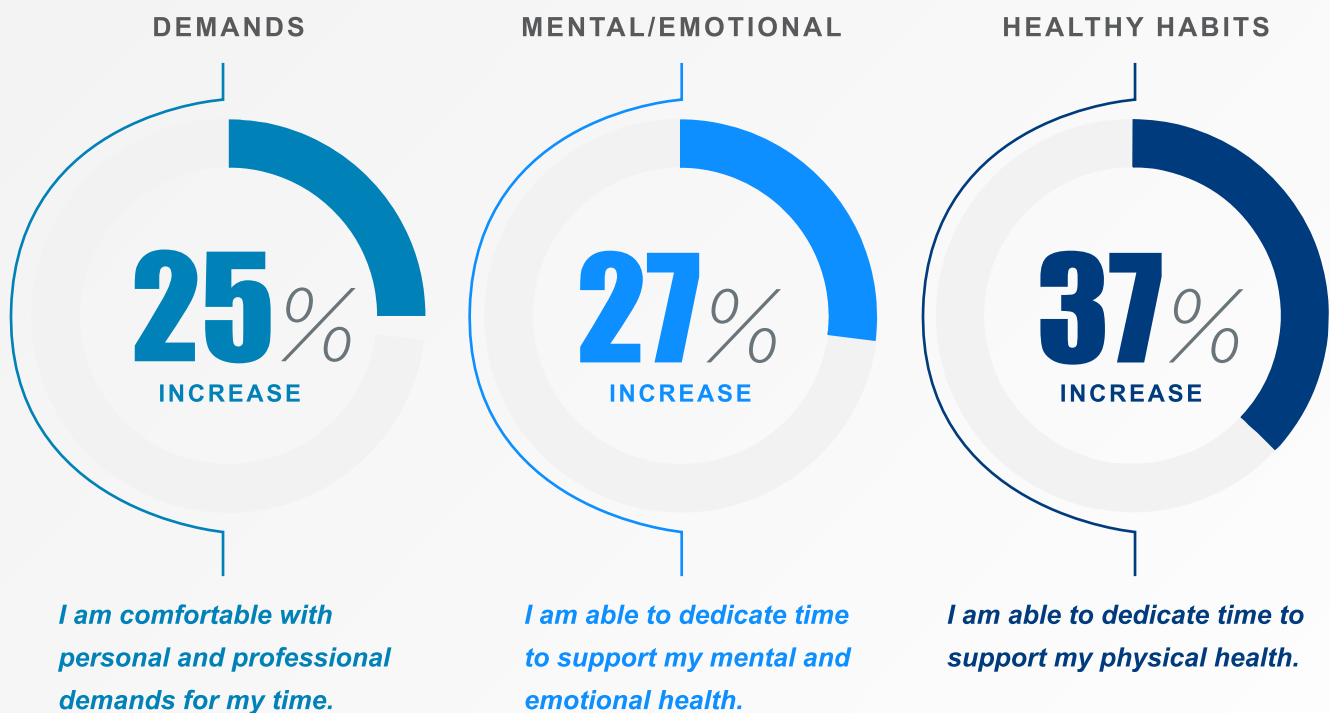
“I’ve been feeling I’m not thinking clearly,”

*which saw the average response decrease by **20%**. Scores improved across all 20 questions in the three measures, ranging from 0.2 to 0.7, representing 9% to 20% improvements.*

When EY US introduced the Team Wellbeing Toolkit in the summer of 2022, they used those same questions from the People Pulse Survey (the 2021 version) to track changes in the pilot teams over the course of three months (May through July of 2022). Trends were similar across the three questions, with the percent of respondents who answered positively increasing by 25% for the demands on their time, 27% for the time to support mental and emotional health questions, and 38% for the time to practice healthy physical habits question (Figure 7).

FIGURE 7

Changes in Responses of Team Wellbeing Toolkit Pilot Participants to Wellbeing Questions

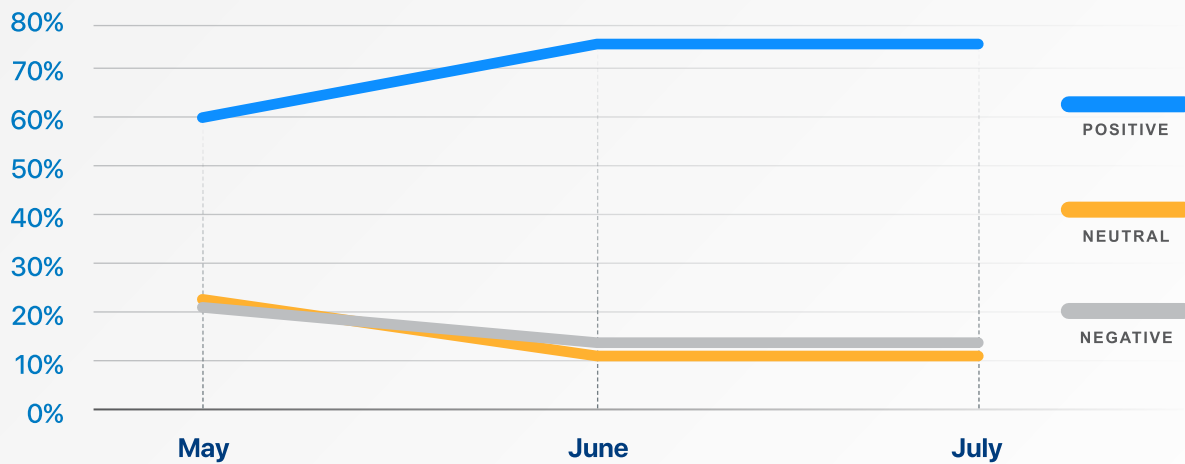


Source: EY US Team Wellbeing Toolkit Pilot Survey

Note: May N=218; July N=140. Prompt for Demands was "I am comfortable with the personal and professional demands for my time," for Mental/Emotional was "I am able to dedicate time to support my mental and emotional health needs," and for Healthy Habits was "I am able to dedicate time to practice healthy habits." Positive includes responses of strongly agree and agree, neutral is neither agree nor disagree, and negative includes strongly disagree and disagree.

When looking at all three questions together, the overall proportion of respondents who responded positively increased from 59% to 76% between May and July 2022 (Figure 8).

FIGURE 8
Aggregate Trend in Responses of Team Wellbeing Toolkit Pilot Participants to Wellbeing Questions



Note: May N=218; June N=131; July N=140. Represents percent of responses across all three questions. Positive includes responses of strongly agree and agree, neutral is neither agree nor disagree, and negative includes strongly disagree and disagree.

RECOMMENDATIONS

EY US continues to refine its wellbeing initiatives by increasing focus on team wellbeing to promote boundaries between work and personal time and increasing the “bandwidth” for individuals and teams to employ norms and tools. In addition, the firm continues to promote, refine, and assess its available wellbeing tools and programs.

The application of a universal design to implementation helped EY US deploy a wellbeing model that continues to evolve and improve. Three key elements to the implementation of the firm’s wellbeing model were 1) teaming natural EY US communities with internal mental health clinicians to create a norm of openness and authenticity in discussing individual mental health and wellbeing concerns, 2) the ongoing engagement of leadership as wellbeing role models, storytellers, and initiators of wellbeing dialogue, as well as the investment in creating an executive wellbeing role, and 3) the empowerment of EY US individuals and teams to influence wellbeing norms and behaviors to fit their specific needs. To establish a similar wellbeing initiative and begin to change organizational culture around wellbeing and mental health with elements of universal design, employers should:

Employ and enable an internal team of mental health professionals to listen to and educate employees and target stigma. The EY US team of internal clinicians was instrumental in the success of the firm’s wellbeing initiative and in de-stigmatizing conversations about mental health, substance misuse, and overall wellbeing. Because the clinicians are part of the firm, they understand how employees within EY US work as no external vendor could, allowing them to more fully understand workplace wellbeing issues specific to the firm. It also allowed them to work directly with firm leaders, ERGs, functional groups, and communities internal to the firm to continue education and awareness related to the importance of wellbeing at work.

Build a climate of trust. Trust is difficult to create but should not be overlooked. If employees do not trust organizational leadership, they will not participate in storytelling or other elements of a wellbeing initiative.

Consider wellbeing for all rather than concentrating on individual “fixes.” A key element of universal design is to roll out plans focused on everyone in addition to changing existing elements to meet the needs of an individual. Establishing “wellbeing for all” is imperative to changing organizational culture around wellbeing.

Promote wellbeing in a combined bottom-up and top-down manner. Asking employees what wellbeing means to them and engaging individuals and teams are principal elements of wellbeing culture change. Wellbeing is not something that can be driven only by the human resources department or firm leadership.

(continued)

RECOMMENDATIONS *(continued)*

Invest in a wellbeing officer or similar executive leadership role focused on wellbeing. Leadership must be involved and engaged for wellbeing to become institutionalized. Wellbeing officers signal that an organization is dedicated to wellbeing. This role should be intentional and permanent.

Create and monitor measures of success.

Firms should establish research-based wellbeing metrics that will allow for constant measurement of programs and initiatives. These should include not only numeric measures but also ways to hear qualitative—contextual—evidence of success or failure through avenues of feedback such as focus groups or anonymous written reviews.



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