

# PERSPECTIVE

The background of the entire image is a composite. The top half shows a man with a beard, wearing a blue shirt, looking out from a high-rise building with glass railings. The bottom half shows a view of the Earth from space, with a blue horizon and white clouds against a dark blue sky.

**CHANGES EVERYTHING.**

**Navigating Uncertainty in a Changing World**

**WIPFLI**

# Presenters



## **Marcie Bomberg Montoya**

Partner

Sponsor of Wipfli's Multicultural Business Resource Group

Founder of a Community Development Financial Institution Assisting the Underbanked Latino Population

Childless Cat Lady



## **Alyson McKinster**

Senior Manager

National Chair of Wipfli's Multicultural Business Resource Group

Mental Health Awareness Advocate

Recovering People Pleaser

Musician

An abstract graphic consisting of a thick blue line that forms a continuous, flowing shape. It starts as a large circle on the left, then curves and loops back to form a second, smaller circle on the right, with a small gap at the top of the second loop.

# **Importance of Mental Wellness**

## Culture: Impact on employee wellness

**“Organizational culture encompasses the beliefs, behaviors, and attitudes that shape the work environment and influence employee well-being.”<sup>1</sup>**

<sup>1</sup>[The Impact of Employee Wellness on Organizational Culture: A Deep Dive written by Corporate Wellness Magazine](#)



**“The opposite of fitting in is belonging.”**

**Fitting in**, is about assessing a situation and becoming who you need to be to be accepted.

**Belonging**, on the other hand, doesn't require us to change who we are; it requires us to be who we are.”

– Brene Brown

# Toxic culture

- Toxic organizational cultures are the strongest predictor of industry adjusted attrition and are 10 times more important than compensation in predicting turnover.
- Leading elements contributing to toxic cultures include failure to promote
  - ▶ Diversity
  - ▶ Equity
  - ▶ Inclusion
  - ▶ Workers feeling disrespected
  - ▶ Unethical behavior
- Lack of courageous leadership
  - ▶ **Back channeling** - During a convo, verbal or nonverbal, occurs when one participant is speaking and another participant interjects responses to the speaker
  - ▶ **Blaming and finger pointing** - Bullying/teasing, comparison, cover up, discrimination, favoritism, gossip, harassment
  - ▶ **Invisible army** - Perfectionism, self-worth tied to productivity.

# Transactional culture




## What it looks like


- Purely business case driven
- Core operations (focus on process, procedures)
- Data dependent and driven (usually qualitative)
- Using People Analysis tools innapropriately


## What it causes


- People feel like widgets
- False sense of certainty and knowing
- Compliance - "fear of getting it right" over all else
- Output and impact are just viewed by numbers



adamgrant 

Following 



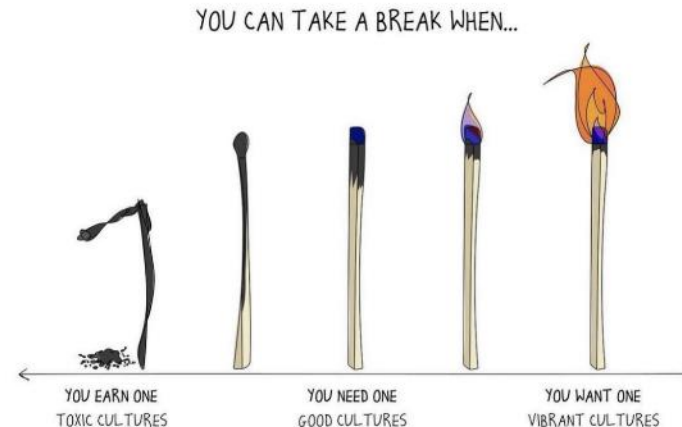
**Adam Grant**   
@AdamMGrant

True commitment to work-life balance is giving people permission to take other priorities as seriously as their jobs.

In burnout cultures, people are expected to drop everything for work. In healthy cultures, people are encouraged to protect time for family, health, and leisure.

adamgrant 


Following 




@RESEARCHDOODLES BY M. SHANDELL

adamgrant 

Following 



**Adam Grant**   
@AdamMGrant

In toxic cultures, you have to burn out to earn a break. Time off is how you recover.

In decent cultures, you take a break when you're low on gas. Time off is how you refuel.

In healthy cultures, you're expected to take regular breaks. Time off is encouraged to sustain energy.



# Transformational culture

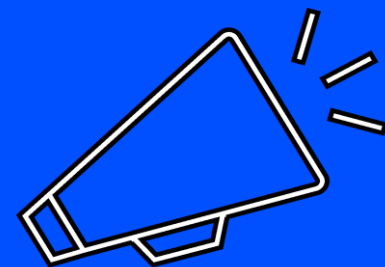


## What it looks like

- People centric introspection required
- Behavior shift (internally motivated)
- Intentional impact on process/procedures
- Intentional use of data
- People holding people socially accountable

## What it causes

- People know that their story matters
- People centered- social and system accountability
  - ▶ Social accountability
    - When people make change between people and it's relational
    - Behavior and mindset changes and that's what changes culture
  - ▶ People have a space where they can open their mouths and minds.



What does a culture of mental wellness look like for you?

## Mental wellbeing

The World Health Organization (WHO) provides a mental wellness definition:

**“A state of well-being in which the individual realizes [their] own abilities, can cope with the normal stresses of life, can work productively and fruitfully, and is able to make a contribution to [their] community.”**



# Mental wellness: Is there a crisis in the US?

**22.8%** of U.S. adults experienced mental illness in 2021 (**57.8 million people**). This represents 1 in 5 adults.

**16.5%** of U.S. youth aged 6-17 experienced a mental health disorder in 2016 (**7.7 million people**)

## Annual prevalence of mental illness among U.S. adults, by demographic group:

- Non-Hispanic Asian: 16.4%
- Non-Hispanic Native Hawaiian or Other Pacific Islander: 18.1%
- Non-Hispanic Black or African American: 21.4%
- Hispanic or Latino: 20.7%
- Non-Hispanic White: 23.9%
- Non-Hispanic American Indian or Alaska Native: 26.6%
- Non-Hispanic mixed/multiracial: 34.9%
- LGBTQ+: 50.2%

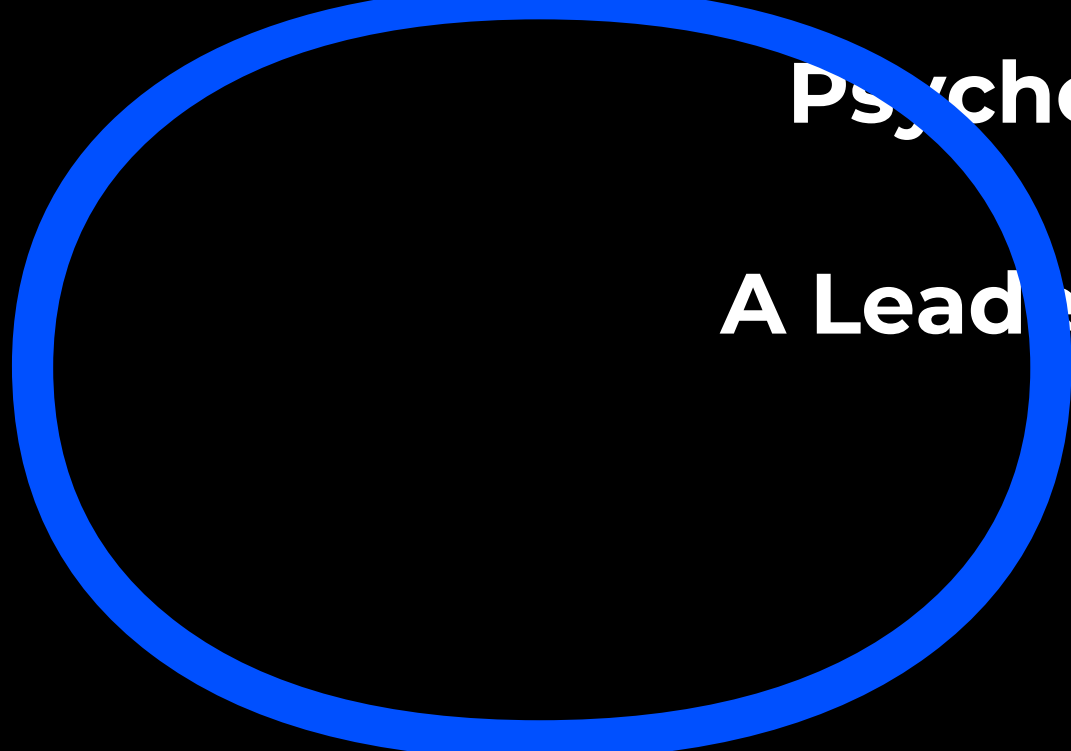
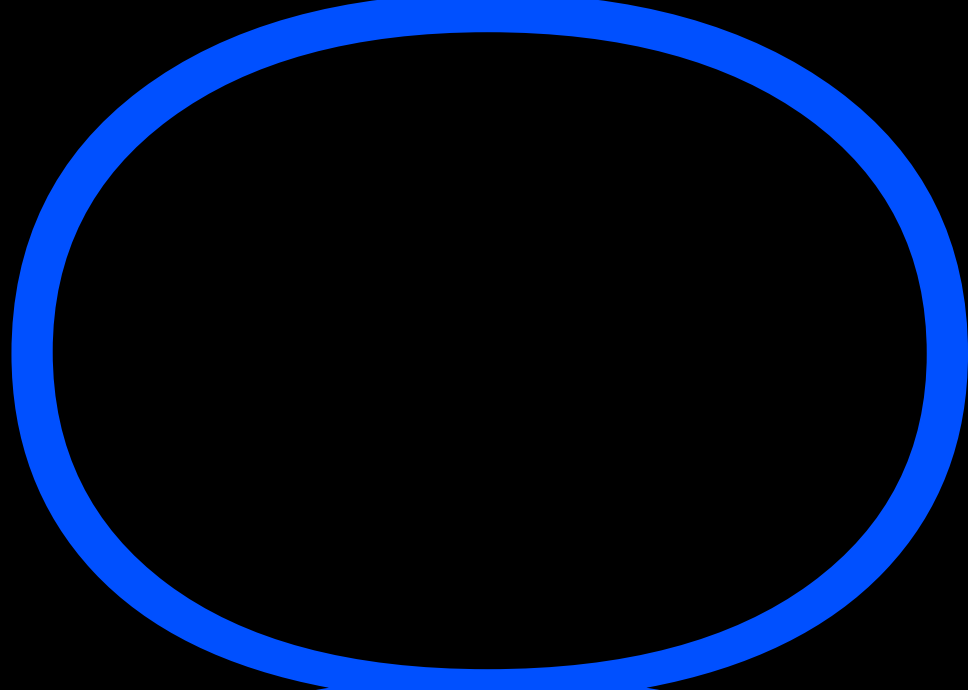
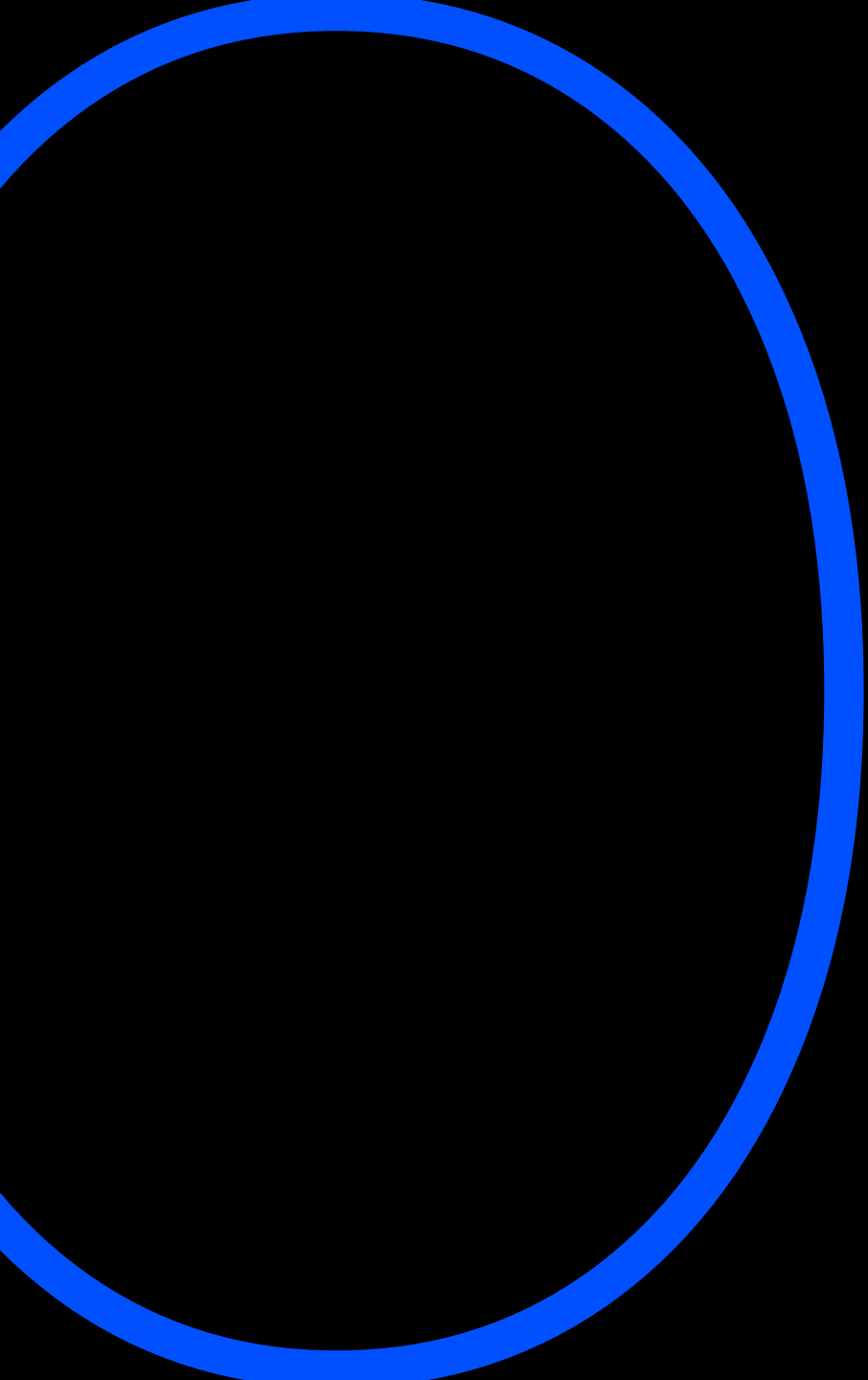




# Mental wellness: Consequences of not addressing

- **Serious mental illness** costs America **\$193.2 billion** in lost earnings per year.
- **Mood disorders**, including major depression, dysthymic disorder and bipolar disorder, are the third most common cause of hospitalization in the U.S. for both youth and adults aged 18 - 40.
- Adults in the U.S. living with serious mental illness **die on average 25 years earlier** than others, largely due to treatable medical conditions.
- Suicide is the **10<sup>th</sup> leading cause of death** in the U.S., and the 2<sup>nd</sup> leading cause of death for people aged 10 - 34.
- More than **90%** of people who die by suicide show symptoms of a mental health condition.
- Each day an estimated **18 - 22 veterans** die by suicide.





**Psychological  
Safety  
A Leader's Role**



# Psychological safety

## WHEN YOU HAVE IT:

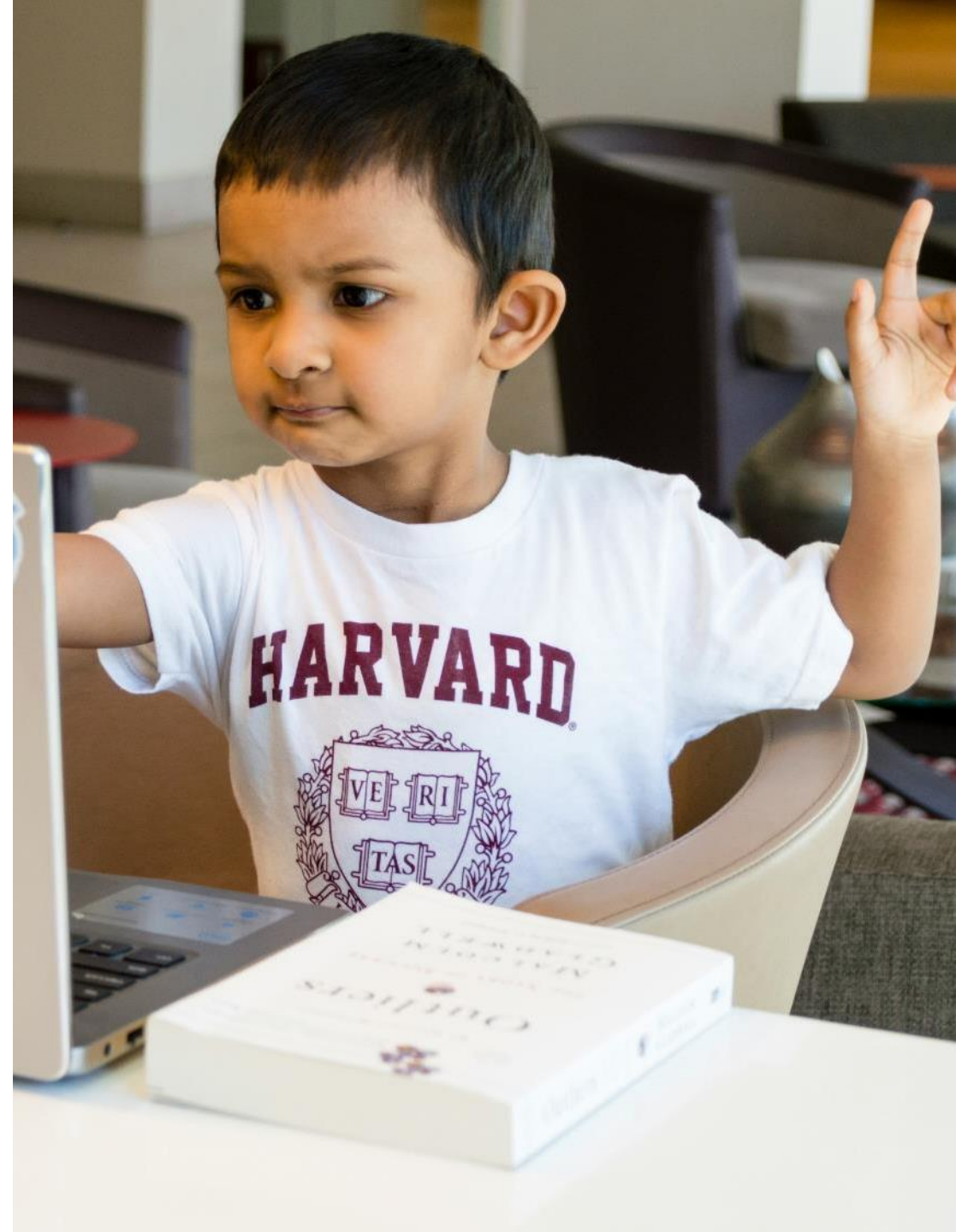
## WHEN YOU DON'T:

<i>See mistakes as opportunities to learn</i>	<i>See mistakes as threats to your career</i>
<i>Willing to take risks and fail</i>	<i>Unwilling to rock the boat</i>
<i>Speaking your mind in meetings</i>	<i>Keeping your ideas to yourself</i>
<i>Openly sharing your struggles</i>	<i>Only touting your strengths</i>
<i>Trust in your teammates and supervisors</i>	<i>Fear of your teammates and supervisors</i>
<i>Sticking your neck out</i>	<i>Having it chopped off</i>



## Psychological safety: Supervisor talk

- Who wants to volunteer to give an example of how you communicate psychological safety with your team?



# Psychological safety: Supervisor talk

## Psychological safety: How to say it

- This is totally new territory for us, so I'm going to need everyone's input.
- There are many unknowns/things are changing fast/this is complex stuff. So we will make mistakes.
- Okay, that's one side. Let's hear some dissent/who's got something to add/let's have some give-and-take.
- Lucy, you look concerned. Gilles, you haven't said much. Adrian, what are you hearing in the warehouse/on the phones/on the road?
- What assumptions are we making? What else could this be/could we investigate/have we left out?
- What are you up against? What help do you need? What's in your way?
- Did everything go as smoothly as you would have liked? What were the friction points? Are there systems we should retool?
- If you've got something to add, just... (mention a few channels of communication, including ones suitable for difficult conversations).
- Thank you for that clear line of sight.
- I really appreciate your bringing this to me. I'm sure it wasn't easy.

# Psychological safety: Employee talk

## Psychological Safety: How to say it when you're not the boss

- Something's been troubling me. Do you have a few minutes to talk about it?
- Some of this is not good news. Is this an okay time to dig in?
- We've got some updates we'd like to run by you.
- I've hit a roadblock/I've got to go back to square one
- I mentioned the problem to the team and we've got some ideas.
- I've made a mistake and wanted to let you know right away.
- Our experiment didn't go as hoped.
- I need help figuring this out.
- There's been an uptick in X, and we can't explain it yet.
- What's the best procedure for getting input? Who should I approach?
- How much detail do you like to hear?
- I need another pair of eyes on this. Do you have a minute/hour/day to look at it?
- I don't feel right about this. Can we pause and take a closer look?



## Psychological Safety: How managers can help

3 intentional things leaders can do to create psychological safety in the workplace, per [Niki Ramirez](#):

### 1. **Normalize getting through bad days.**

- Talk with your team about it when \*you\* have a bad day. If you'd like, share how you're getting through it.

### 2. **Normalize learning through and being accountable for mistakes.**

- Share with your team when \*you\* make a mistake and how you're fixing it. If you'd like, share how making the mistake makes you feel (stressed, embarrassed, nervous).

## Psychological Safety: How managers can help

3 intentional things managers can do to create psychological safety in the workplace, per [Niki Ramirez](#):

### **3. Normalize making space to talk about personal and professional struggles. There is room for both at work.**

- When you ask an employee how they are doing, make it abundantly clear that you want the real answer.
- Wait for them to answer. :)
- Ask a follow up question to reflect/verify. And, when they share that something is troubling them, actively listen. Ask if they would like any specific support or help.
- Make resources available (e.g., ideas, time, tools) to ease the burden of a bad day.





# **Burnout – What it is and how to address it**

# Introduction to Burnout

Have you heard these phrases from your employees? Have YOU said any of these phrases?

- *I'm so tired.*
- *When is this going to end?*
- *How am I supposed to get this done with everything else I have to do?*
- *I can't believe we're still doing this.*
- *I am burned out!*

1 in 4 Americans have admitted to being burned out and feeling tired, pessimistic, and disengaged from their work.

# Introduction to burnout

## What is burnout? According to the WHO:

***Burn-out*** is a syndrome conceptualized as resulting from chronic workplace stress that has not been successfully managed. It is characterized by three dimensions:

1. Feelings of energy depletion or exhaustion;
2. Increased mental distance from one's job, or feelings of negativism or cynicism related to one's job; and
3. Reduced professional efficacy.

Burn-out refers specifically to phenomena in the **occupational** context and should not be applied to describe experiences in other areas of life.

## Behind the burnout: Signs to watch for

- Emotional and/or physical exhaustion
- Difficulty concentrating / lack of focus
- Difficulty sleeping / maintaining quality sleep
- Panic attacks
- Difficulty breathing / chest pains
- Migraines
- Digestive issues
- Detachment / cynicism
- Resisting social activities / increased isolationism
- Reduced productivity
- Feelings of ineffectiveness / lack of accomplishments



## Addressing burnout: What organizational leaders can do!

- What are systemic behaviors that build a culture that helps build psychological safety and resiliency, and prevents burnout?
  - Conduct an organizational analysis – collect data, watch metrics, listen to staff.
  - Educate and empower your leaders – make them aware of what the standards are.
  - Focus less on when, where, and how work happens and more on results and high value work.
  - Acknowledge and support people's lives and priorities outside of work.
  - Clarify what is expected of each employee.
  - Encourage employees to share when they are feeling overloaded.
  - Recognize that people need concentrated time (often offline) to work effectively.
  - Change up your own work routines to fit in your personal, family, or health commitments.

# Addressing burnout: What organizational leaders can do

- Encourage self-care!
- Remember, burnout is chronic stress created by workplace culture that accepts or encourages overwork, lack of autonomy, lack of reward, injustice, or value conflicts.

**Self-care isn't selfish!**





# Self-Care Tips

## 1. Take care of your body

- Drink water, exercise, eat as well, sleep

## 2. Talk, Share, Connect

- Humans are meant to be a part of communities

## 3. Watch what you consume

- You are what you eat!
- You are what you watch!
- You become who you surround yourself with. Notice how your body feels when you leave people.

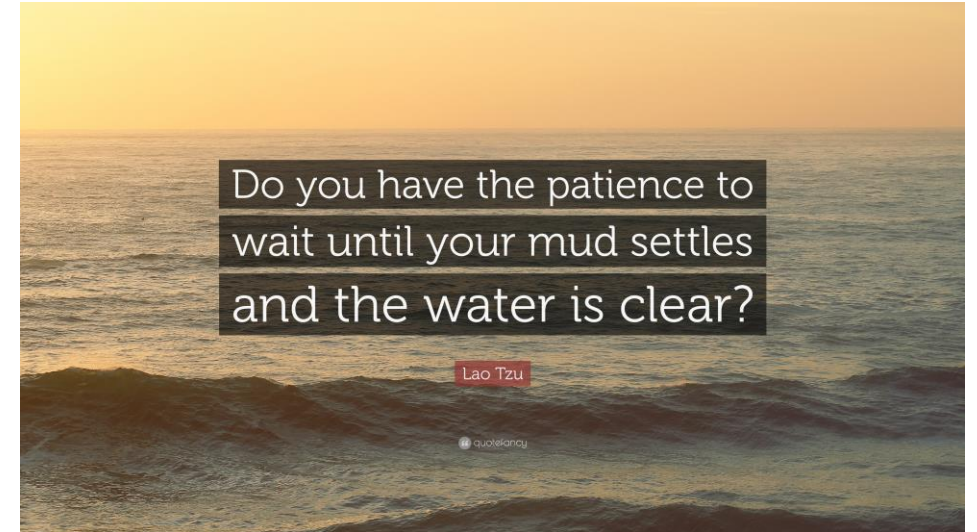
## 4. Mindfulness and gratitude



# Addressing burnout: Self care

## Meditation

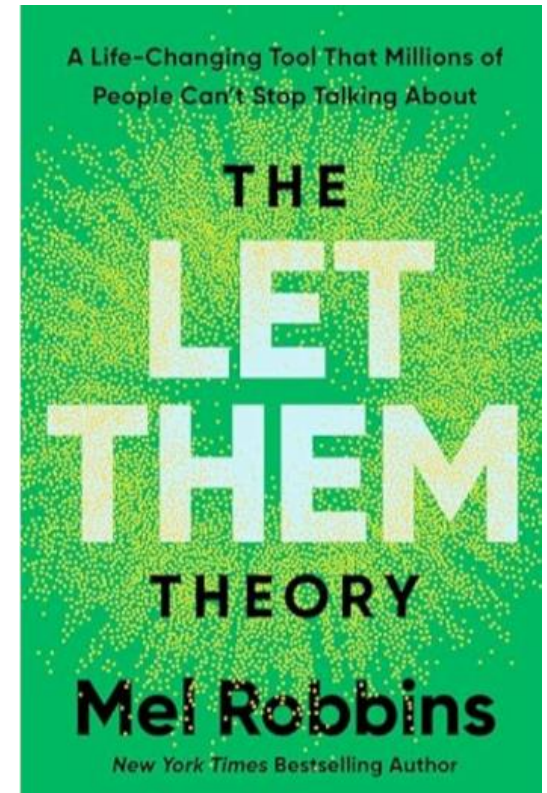
- Eastern Meditation
- Zen
- Benefits of meditation
- Tips to begin the practice:
  1. Create a meditation space
  2. Find your posture
  3. Breathe deeply
  4. Let go of thoughts
  5. Close your meditation practice



**It's crazy but we can't control others.. Only ourselves :)**

- **5 Second rule**

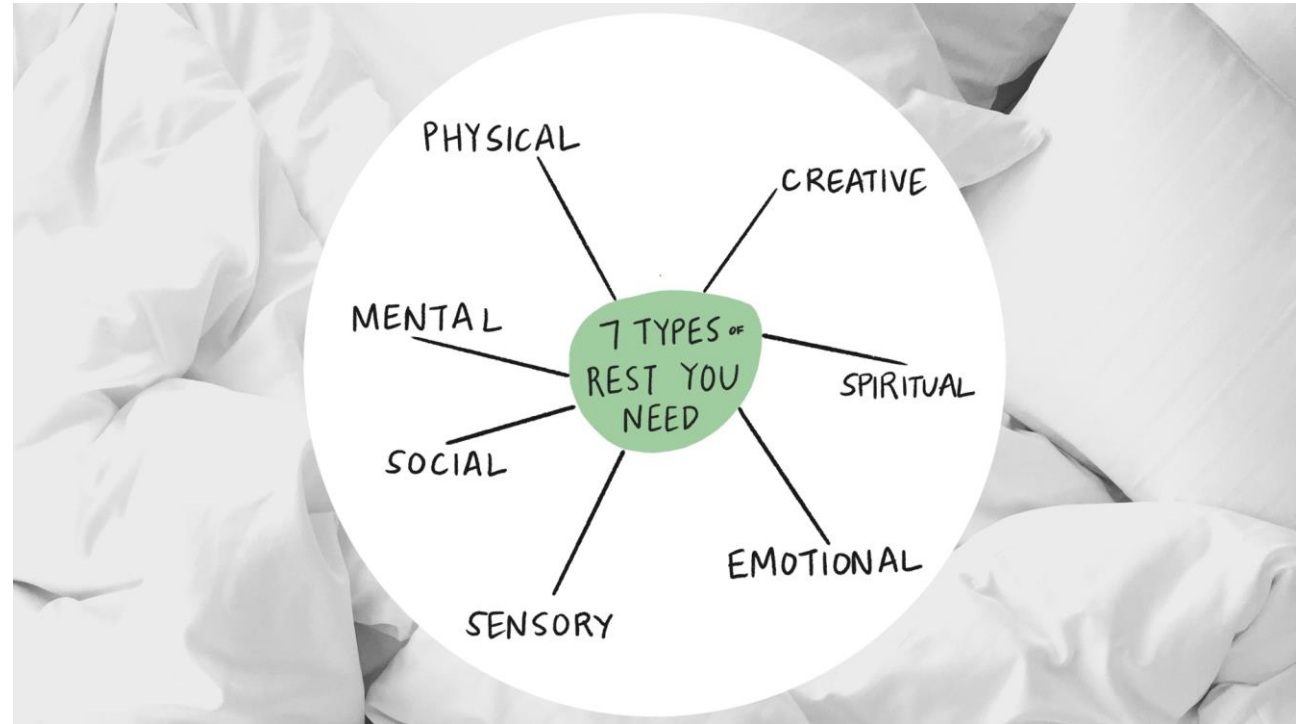
- Count backwards from 5
- Disrupts stress hijack and allows you to make better decisions
- This works, I have tried it many times



## Ever slept 8 hours and still been tired? ;)

- Seven types of rest
  - According to Dr. Sandra Dalton-Smith, there are 7 types of rest to focus on getting energy:

1. Physical rest
2. Mental rest
3. Social rest
4. Spiritual rest
5. Sensory rest
6. Emotional rest
7. Creative rest



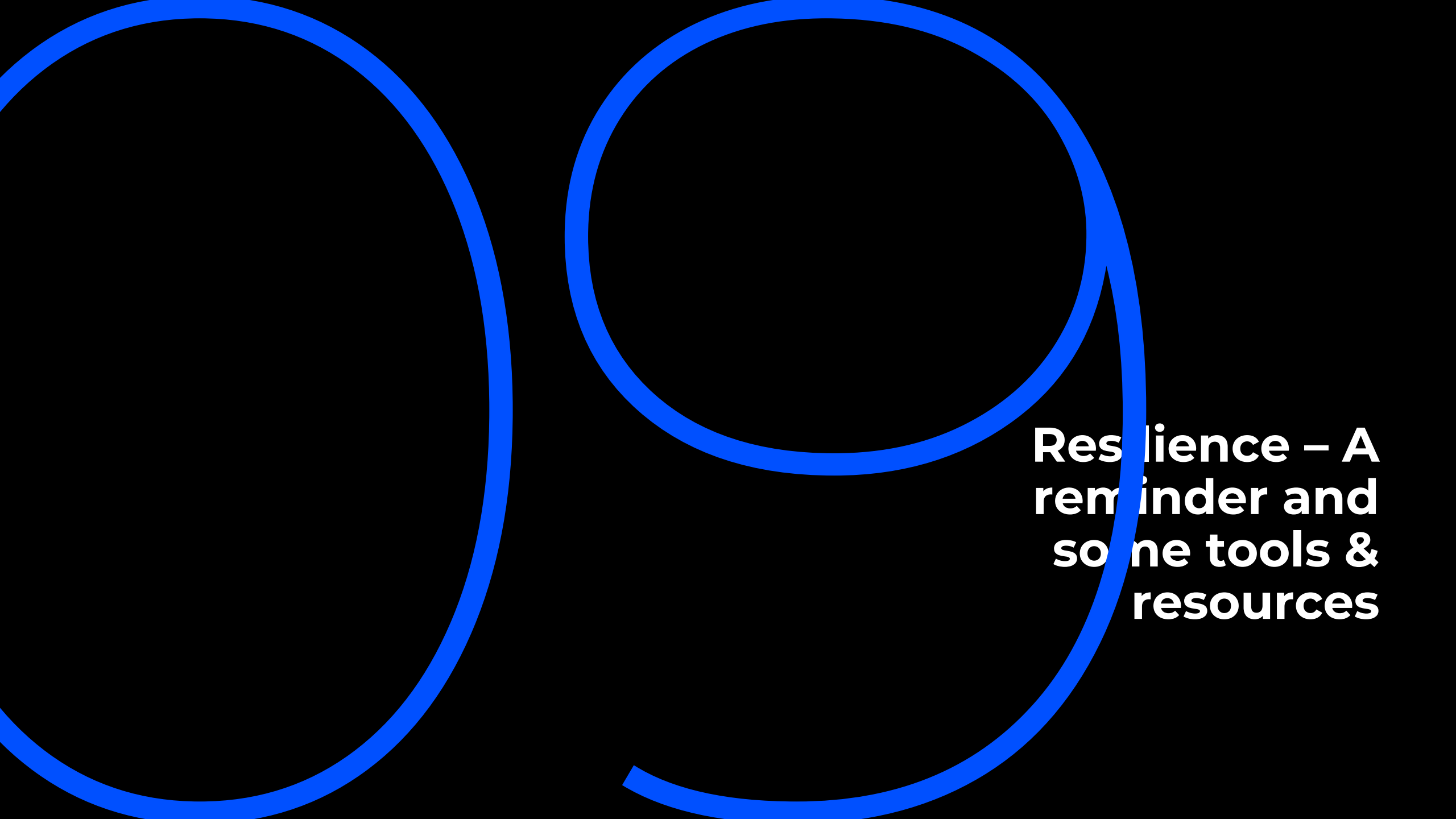
# Compassion Fatigue

## Causes

- Emotional and physical burden created by the trauma of helping others in distress, which leads to a reduced capacity for empathy toward suffering in the future

## Characteristics

- Intrusive negative thoughts
- Physical problems (gastrointestinal issues, headaches, lethargy).
- Loss of hope
- Questioning one's contribution
- Skepticism or guilt


























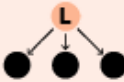
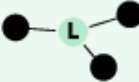

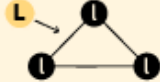



**Resilience – A  
reminder and  
some tools &  
resources**



# Generations POTENTIALLY in this room!



Category	Builders Born: 1925-1945	Baby Boomers Born: 1946-1964	Generation X Born: 1965-1979	Generation Y Born: 1980-1994	Generation Z Born: 1995-2009	Gen Alpha Born: 2010-2024
Slang terms	 We prefer proper English if you please	 Be cool Peace Groovy Way out	 Dude Ace Rad As if Wicked	 Bling Funky Doh Fashizz Whassup?	 Fam GOAT Slay Yass queen	 lit yeet hundo oof rn idrc
Social markers	World War II 1939-1945	Moon landing 1969	Stock market crash 1987	September 11 2001	GFC 2008	COVID-19 2020
Iconic cars	 Model T Ford Final 1927	 Ford Mustang 1964	 Holden Commodore 1978	 Toyota Prius 1997	 Tesla Model S 2012	 Autonomous vehicles 2020s
Iconic toys	 Roller skates	 Frisbee	 Rubix cube	 BMX bike	 Folding scooter	 Fidget spinner
Music devices	 Record player LP, 1948	 Audio cassette 1962	 Walkman 1979	 iPod 2001	 Spotify 2008	 Smart speakers Now
Leadership style	 Controlling	 Directing	 Coordinating	 Guiding	 Empowering	 Inspiring
Ideal leader	Commander	Thinker	Doer	Supporter	Collaborator	Co-creator
Learning style	Formal	Structured	Participative	Interactive	Multi-modal	Virtual
Influence Advice	Officials	Experts	Practitioners	Peers	Forums	Chatbots
Marketing	Print (traditional)	Broadcast (mass)	Direct (targeted)	Online (linked)	Digital (social)	In situ (real-time)

# Baby Boomers (1946 – 1964)

## Major Events:

- ▶ Aftermath of WWII, Vietnam War, Cuban Missile Crisis, Civil Rights Movement, Woodstock, Beatlemania, First Man on the Moon, JFK and MLK Assassinations, Invention of TV, Watergate Hotel, Kent State, Divorce Court, Explosion in Consumer Products

## Generational Personality:

- ▶ Optimistic
- ▶ Competitive
- ▶ Dedicated
- ▶ Chain of Command

## "Vibe" & Stereotype:

- Free love, Frisbees & Ford Mustangs
- Pushed back on political decisions that needed to change! Rise of feminism. Desire for equality! Brought about massive cultural change :)
- ST:: Don't care about emotions or mental health. Work is work home is home



# Generation X (1965 – 1980)

## Major Events:

- ▶ Recession, Dot.com, Starbucks, Michael Jordon, Clinton-Lewinsky Scandal, Clarence Thomas, O.J. Simpson, 24-Hour Media, High-Divorce Rate, Stock Market Crash, Gulf War, Technology Revolution

## Generational Personality:

- ▶ Resourceful
- ▶ Independent
- ▶ Work is Work
- ▶ Skeptical
- ▶ Self-Command



## "Vibe" & Stereotype:

- Totally radical "middle child" pushback on authority. Embraced small businesses and entrepreneurial efforts
- Ensuring millennials & gen z has a great work experience

# Millennials (1981 – 1996)

## Major Events:

- ▶ September 11, 2001, President Obama Elected, Columbine, Hurricane Katrina, Gay Marriage, Iraq/Afghanistan Wars, Facebook, Pinterest, Technology, World Wide Web
- ▶ Parents are boomers typically

## Generational Personality:

- ▶ Idealistic
- ▶ Appreciate Diversity
- ▶ Enthusiastic
- ▶ Instantaneous
- ▶ Don't Command - Collaborate



## "Vibe" & Stereotype:

- First generation to be shaped by the internet
- ST: Passionate, Lazy, Entrepreneurial, magical thinking, late bloomers.



# Gen Z (1997 – 2012)

## Major Events:

- ▶ COVID-19, communication on phones period, Great Recession of 2008, High Non-Discretionary Expenses, Social Networking, Gun Violence, Climate Change, Corporate Social Responsibility, Always Wired (always have been), Wealth Gap, Global Events, High Education Costs (most educated, most indebted), One-Click Purchasing
- ▶ Millennial is typically big sister/brother typically
- ▶ 55% of 18-24 year olds have or are receiving treatment for mental illness

## Generational Personality

- ▶ Pragmatic/Realistic
- ▶ Independent & Entrepreneurial
- ▶ Fiscally Responsible-Want Stable Jobs
- ▶ Most likely to leaved jobs if unhappy
- ▶ Digital Natives
- ▶ Vocal and Expect to Have a Voice

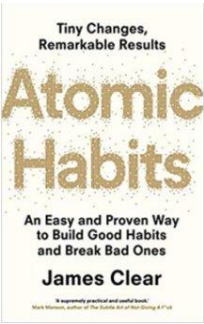
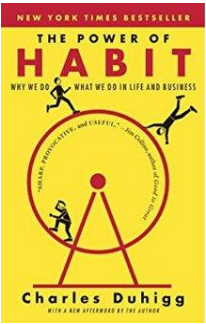
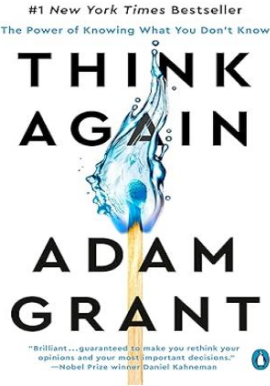
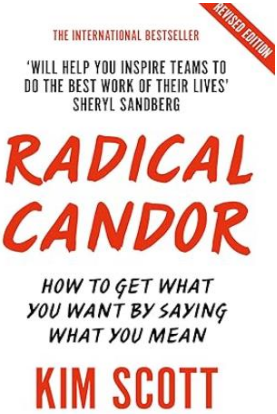
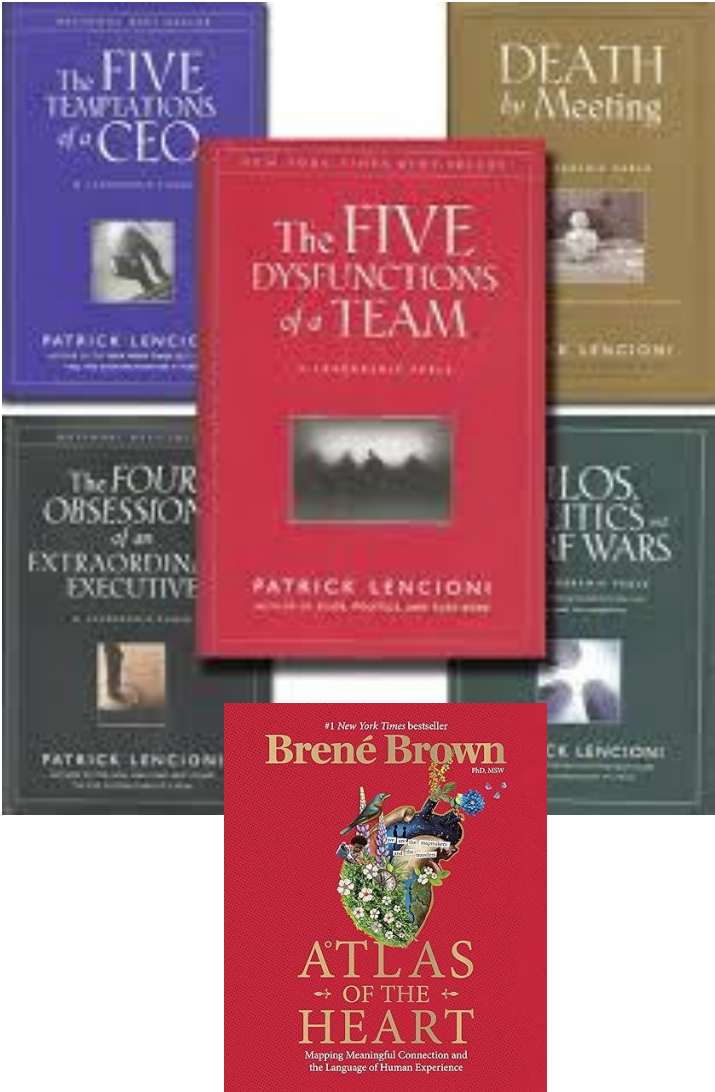


## "Vibe" & Stereotype:

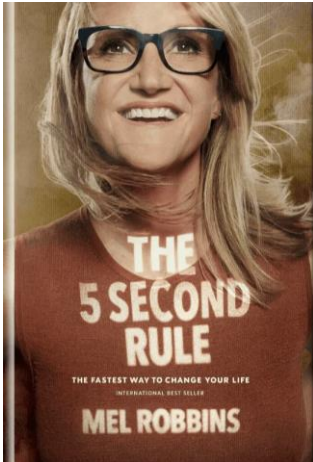
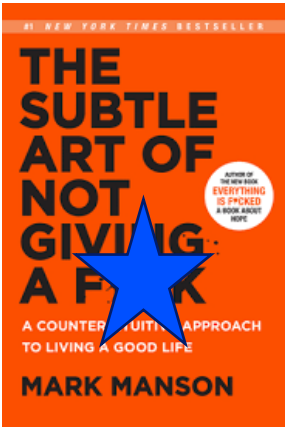
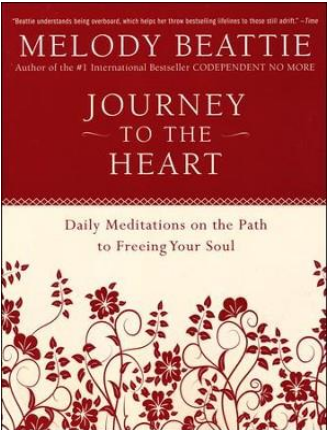
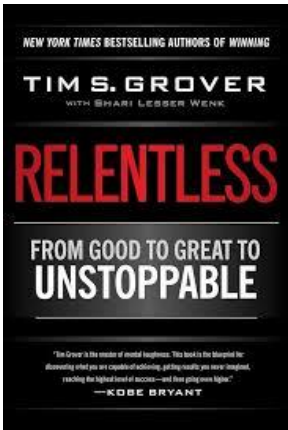
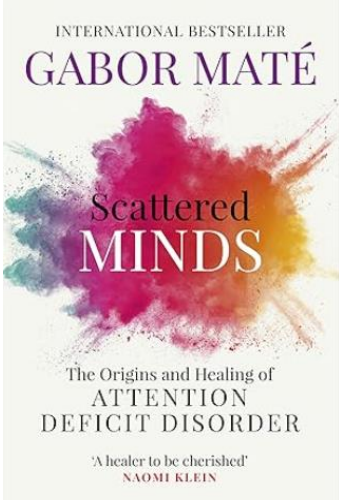
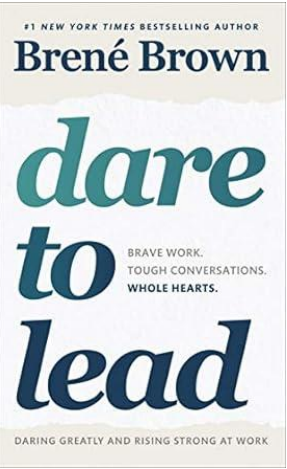
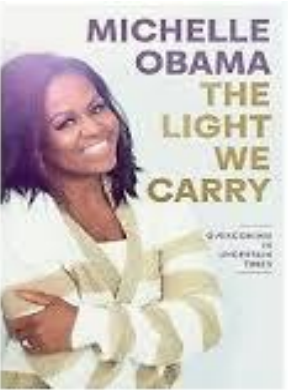
- Today's future up and coming generation
- Expect Diversity & Equality (Most Diverse Generation in History) woohoo!
- More likely to work for a nonprofit than any generation- yipee!
- ST: "Don't want to work" , don't want to work hard.



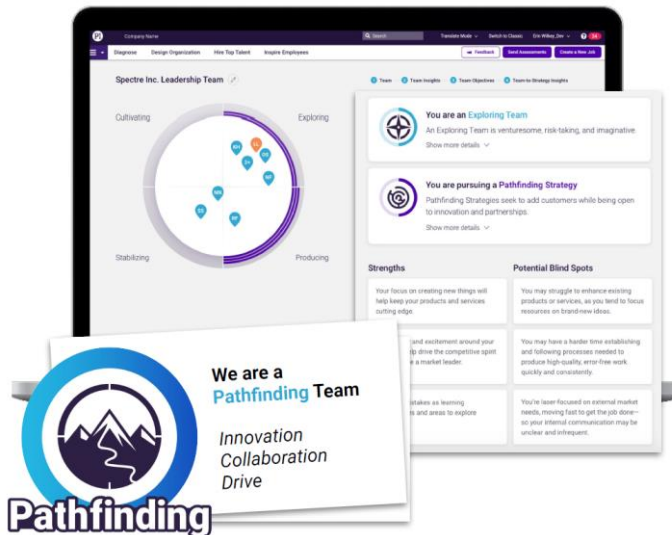
# Don't Do It Alone



VS.



# Being human is hard, let us help



WIPFLI

## Leadership Essentials

WIPFLI

## Executive Coaching

## Sources & resources

- [7 Types of Rest: The Key to Becoming the Prepared Adult](#)
- *Beating Employee Burnout* by Crucial Learning
- *Plan to Extinguish Organizational Burnout* by McLean & Company
- [What Is Psychological Safety?](#) (*Harvard Business Review*)
- [Burnout](#) (*Psychology Today*)
- [Americans at Work: The God That We Worship](#) by Paul LaLonde
- *The Stoics* by Ryan Holiday and Stephen Hansselman
- *The Meditations* by Marcus Aurelius (Gregory Hayes translation)
- *Why You Should Learn to Journal Like the Stoics* by Donald Robertson
- *Be Water My Friend: The Teachings of Bruce Lee* by Shannon Lee
- [What are the real behaviors that lead to burnout?](#) By Jacqueline Kerr
- [The Value of Worker Well-Being](#) by Sage Journals
- [5 Ways to Build Resilience and Conquer Adversity](#) by Mark Manson

## Sources & resources

### National Alliance on Mental Illness (NAMI) HelpLine:

- Available M-F, 10 a.m. – 10 p.m. ET. Call **800-950-6264**, text “helpline” to **62640**

### Hope for the Day

- [Find Help — Hope For The Day \(hftd.org\)](https://hftd.org)

### 988 Suicide & Crisis Lifeline

- Dial 988 Nationwide for 24/7, free and confidential support for people in distress, prevention and crisis resources for you or your loved ones, and best practices for professionals in the United States.



# Be the change you want to see in the world.. really

- **It Starts with YOU**

- How you show up for yourself
- Who you surround yourself with
- How you talk to yourself
- What you consume
- How you get to know yourself a little more every day



# To Email Aly for a 1:1 Relationship Guide or Team Micro Culture Report (Complimentary)



## Relationship Guide

## Your Team Microculture

### PI Relationship Guide

Steve M      Mike F

#### Strengths

Efficient, purposeful, and somewhat assertive when communicating with each other.  
Friendly, expressive, and engaging in communication, readily establishing rapport.  
Communicate informally and on an ad-hoc basis, and will actively seek information when they feel it's needed.

#### Cautions

May not listen closely to each other when there is disagreement.  
May interrupt each other, or they may initiate communication when it suits their own individual schedules.  
May have difficulty moving a conversation forward constructively when they do not agree with each other

#### Tips

Should consciously acknowledge that each person has perspectives and information that could be beneficial to the other.  
Remember to practice active listening and leave each conversation with a clear list  
May not keep track of their discussions, so using electronic modes of communication might help them keep a record

### Team Discovery

#### Team Type

You are an **Adapting Team**

You are pursuing a **Producing Strategy**

#### Strengths

#### Blind Spots





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