

Guide to Improving Workplace Mental Health and Well-being

For Social Impact and People and Culture Leaders



About YourCause

At YourCause, we have been helping companies support employee engagement initiatives that connect to corporate purpose and drive meaningful change towards critical social issues since 2007. We support over 500 organizations from Fortune 500 companies to small and medium-sized businesses to drive employee engagement in giving, volunteering, DEI programs and more. Our clients in the Global Good Network™ engage employees from 116 countries with opportunities to drive social impact. The tips, best practices and resources are curated by our team of experts that help companies maximize the use of the YourCause platform, launch new programs + grow and scale.

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About EVERFI

EVERFI provides online HR and workplace compliance training that drives change and is easy to use – backed by compliance expertise. EVERFI's Workplace Culture Network brings together 1,200+ corporations committed to addressing the most challenging workplace compliance and culture issues in innovative ways. At EVERFI, we take a prevention-focused approach to workplace training, blending elements of compliance with culture-based training to promote a healthy workplace.

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**WE FUEL
IMPACT**

Following the impacts of the pandemic, the U.S. Surgeon General released a report, [Workplace Mental Health & Well-being](#)¹, that highlights the critical connection between corporate work environments and employee mental health. The report included a call to action for companies to amplify their work in protecting employees from harm and fostering community and connection, all while supporting meaningful work. This guide provides an overview of research from the Surgeon General, World Health Organization, SHRM and other sources on the business impacts of toxic vs. healthy work environments, then dives into ways companies can implement the essentials for improving workplace mental health & well-being.

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The content was curated and produced by the EVERFI from Blackbaud Workplace Culture Network and the YourCause from Blackbaud team to provide a comprehensive guide for implementing initiatives that meet the Surgeon General's call to action.

Introduction

In October 2022, the U.S. Surgeon General issued a warning to employers everywhere: toxic work environments are harmful to employees' mental and physical health.

The statement accompanied the release of a report calling upon employers to play a key role in addressing the mental health crisis in our society today.

Employees are experiencing more challenges than ever before—both outside of work and inside the workplace. Physical health issues, financial strain in an uncertain economy, care giving responsibilities, and current events such as violence or social unrest in communities weigh heavily on many employees today.

Couple this with significant changes and stressors within the workplace--layoffs, restructurings, return to worksites, and increased harassment and workplace violence to name a few--it's perhaps not surprising that 76% of employees report at least one symptom of a mental health condition, an increase of 17 percentage points in just two years².

This state of affairs is not only harmful for individuals, but it is bad for business as well. **93% percent of managers have stated that the mental health of their employees is having a negative effect on their bottom line³.** What's worse, **84% of employees say that their working conditions have contributed to a mental health condition.**

It's clear that employee mental health is no longer "a personal issue." It's a workplace issue that requires work environment- and culture-focused solutions.

I was thrilled to see the U.S. Surgeon General unequivocally state in his report that organizations must take a good, long look at their work environments and cultures and the role that those conditions play in harming—or helping—employee mental well-being.

The report's call to action for employers was clear and profound:

organizations must take new approaches--improving their internal working environments, preventing harmful behaviors, and creating positive cultures of inclusion, belonging, safety, and purpose--to improve employee mental health.

This report, and the actions that it calls upon organizations to undertake, truly validates the corporate social impact work that so many companies are doing vis-à-vis workplace culture and employee engagement.

I am so proud that we at EVERFI, experts in workplace culture training, have long been encouraging employers to focus on their work environments as a key lever for supporting employee mental health and well-being. Teaching employees how to prevent toxic and isolating behaviors, foster diversity, equity, and inclusion, and help everyone feel a sense of belonging at work can have a tremendous impact on employee mental health.

At YourCause, our solutions that engage employees in volunteerism and giving in ways that are meaningful to them help all employees cultivate a deep sense of purpose and connection with each other, their organization, and their communities. These feelings of purpose, connectedness, and meaning are more important than ever for employee well-being.

We've created this guide to help organizations take a workplace environment-focused approach to employee mental health. From data to actionable tactics, this guide will help you assess and strengthen current employee well-being programs or get started with something new.

The health of our employees--and our organizations--depend on it.



Letter from Elizabeth Bille, JD, SHRM-SCP

Senior Vice President, Workplace Culture at EVERFI

Tackling Issues of Workplace Mental Health and Well-being

The World Health Organization⁴ indicates that the pandemic created a 25% increase in the prevalence of anxiety and depression around the world.

Mental health and well-being concerns have heightened during and since the pandemic. It's also important to note that the impacts of stress, and resulting mental health issues, have a different effect on employees depending on their jobs, their family situations, incomes, and personal characteristics—like race, sex, age, disability, immigration status, etc.

Organizational leaders, managers, and supervisors have an unprecedented opportunity to examine the role of work in their employees' lives and explore ways to better enable all workers to thrive within the workplace and beyond.

The U.S. Surgeon General's report points to 5 Essentials for Workplace Mental Health & Well-being. The essentials are centered on the worker voice and equity, recognizing that: "Creating an environment where workers' voices are supported without fear of job loss or retaliation is a vital component of healthy organizations."

THE 5 ESSENTIALS

1 Protecting Employees from Harm
The latest Work and Well-being research⁵ from American Psychological Association reveals **toxic and abusive workplaces are too common**, with 1 out of 5 (18%) employees reporting that their workplaces are somewhat or very toxic. Health and safety concerns in the workplace negatively affect stress levels.

2 Connection and Community
As humans, we all have an innate need for connections with other humans. The pandemic, of course, created stress and anxiety as people were forced to minimize these connections. Much of the stress around these situations remains. Employees can benefit from a sense of belonging and community in the workplace which employers can help to support.

3 Work-life Harmony
As employees balance the requirements and demands of their work and personal lives, conflicts can emerge. Work-life balance is important to employees, even more so since the pandemic. Meeting

these needs can help organizations⁶ minimize stress and anxiety while increasing the likelihood that they will retain staff.

4 Matterering at Work
This component emphasizes the importance of feeling valued and appreciated in the workplace. Employers can put systems in place beyond pay to recognize the contributions of all employees.

5 Opportunity for Growth
Employees value the opportunity for personal and professional growth and appreciate companies that can provide it. In fact, LinkedIn research⁷ has indicated that these opportunities are the top driver employees associated with a strong workplace culture.

THE BUSINESS IMPACTS OF Toxic vs. Healthy Work Environments



81,396 hours
of life are spent working

The only thing we spend more time doing is sleeping.



Creating a healthy work environment requires effort and commitment from both employers and employees. Companies that prioritize employee well-being and invest in cultivating a positive workplace culture tend to reap the benefits of higher productivity, employee retention, and overall success.

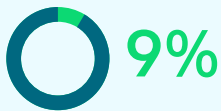


Toxic Work Environment



Stress reached an all-time high with 44% of employees experiencing stress.

Source: 2023 Gallup State of Global Workforce



Only 9% of employees globally identify as thriving and engaged

Source: 2023 Gallup State of Global Workforce

5 icons = \$223 billion ↓

1 in 5 Americans left a job due to toxic cultures causing \$223 billion loss to companies

Source: Society for Human Resource Management Report

\$7.8 trillion ↓ Low engagement cost the global economy 7.8 trillion, 11% of GDP

Source: 2023 Gallup State of Global Workforce

1:4 For every \$1 spent on treating common mental health concerns, there is a ROI of \$4 in improved health and productivity.

Source: World Health Organization



Healthy Work Environment



67% of job seekers evaluate diversity practices before accepting a job.

Source: Glassdoor

↑ 20%



87% ↓

Employees with the highest level of engagement perform 20% better and are 87% less likely to leave an organization

Source: Towers Perrin



21% ↑ Highly engaged businesses see 21% higher productivity

Source: 2023 Gallup State of Global Workforce

Companies with diverse employees experience:



20% higher rate of innovation



19% higher revenues

Source: McKinsey's 2020 report

Protecting Employees from Harm

The first Essential--and critical starting point for all employers--is protecting employees from harm.

This involves safeguarding against both physical and psychological harm, and includes, among other efforts: (1) preventing workplace violence; (2) preventing harassment and discrimination; and (3) reducing bias and exclusion through a focus on diversity, equity, inclusion, and accessibility.

PREVENTING WORKPLACE VIOLENCE

Taking proactive steps to prevent violence at work is essential for minimizing the risk of physical and mental harm to employees. Unfortunately, the need for this work is greater than ever.

How common is workplace violence?

Workplace violence takes many forms, including threats and verbal abuse, harassment and bullying, domestic violence that comes to work, physical assault, and homicide.

A 2019 SHRM survey⁸, found that about one-fourth of American workers said their current workplace had been the scene of at least one incident of workplace violence.

Sadly, these numbers likely understate the issue, as government estimates indicate that about one-fourth of workplace violence incidents go unreported⁹. The risks of workplace violence are growing, even for those employers with remote or hybrid workforces. Why would this be?

At least two million people in the U.S. report being victimized by workplace violence every year, according to OSHA data⁹.

- Spikes in stress, crime, and incivility have led to increased violence, particularly in the retail, health care, and transportation industries, and other workplaces serving the public.
- Domestic violence in the U.S. increased by more than 8%¹⁰ during the pandemic. Experts predict¹¹ an increase in workplace violence by abusers who look to monitor, stalk, or harass their target as they return to workplaces—or continue to work at home.
- Increases in online violence. Threats and verbal abuse can happen through email, texts, phone calls, and social media too. In fact, it is often easier to make threats or intimidate people electronically, which harms the safety and well-being of employees wherever they work.

TIP SHEET

Recommended Action Plan to Prevent Workplace Violence

The good news is that organizations can minimize these risks and prevent many workplace violence incidents by planning ahead. Workplace violence prevention programs will vary depending on the company's needs, but the four primary elements include: a policy, reporting channels, a threat management team, and training. While having all four elements is considered best practice, even implementing some of these steps, or scaling them up or down to fit your organization's particular size and needs, is helpful.

1

Robust workplace violence policy.

A workplace violence policy is the foundation of prevention efforts. A policy should be tailored to the specific organization, outline prohibited behaviors (from verbal threats to physical violence), encourage early reporting of warning signs, direct employees to reporting channels, and share how reports will be handled.

- TIP: Before finalizing, have a multidisciplinary team review the policy (including HR, legal, security/facilities, etc.) to gather input and buy-in from key stakeholders.

2

Reporting system for concerns, threats, or incidents.

Early reporting of threats and concerning behavior is critical for preventing harm. Multiple reporting channels are recommended (e.g., a manager, someone in HR or security, a hotline/incident reporting platform) to ensure at least one channel is always available.

- TIP: Designate at least one person to receive and monitor alerts from reporting channels and at least one backup person, so gaps aren't created by employee turnover, travel, or leave.

3

Threat management team to review and respond to concerns.

Threat management teams are important for both prevention and response. They bring together representatives from across the organization who can identify and prepare for potential threats, as well as investigate and respond to concerns as they arise.

- TIP: Convene regular team meetings to proactively review security measures and do tabletop exercises to practice how your organization would respond to an incident using events from the news.

4

Workplace violence prevention training for all employees.

Training is critical for equipping employees with the knowledge they need to proactively spot the warning signs of violence and the skills to keep themselves and others safe. Focusing on prevention with role-appropriate tactics—from reporting to de-escalation of threats—can help employees be mindful, not fearful.

- TIP: Do not solely focus on one type of violent scenario (“active shooter”), as the majority of workplace violence incidents involve actions such as physical assault and threatening behavior.



Deploy to ALL managers and employees

- Onboarding
- Annually recommended



Role-appropriate tactics

- Report
- De-escalate

Prevention lens

- Not just about response
- Everyone has a role



Focus on warning signs

- Act before things escalate

Staying safe during an incident

- Getting help
- Run, hide, fight



After an incident

- Caring for self and others

Training helps employees be mindful, not fearful.

PREVENTING HARASSMENT AND DISCRIMINATION

Another key element of protecting employees from harm includes minimizing bias, discrimination, emotional hostility, bullying and harassment. Thus, a key part of supporting employee mental health involves taking steps to prevent workplace harassment, bullying, and discrimination.

The emotional and physical damage that can be caused by harassment and discrimination at work can be significant. Whether the behavior is verbal or physical, harassment and bullying are forms of workplace violence. In addition, although the Surgeon General report highlights the psychological harms caused by harassment, bullying, and other misconduct, these dynamics can also lead to severe physical health challenges such as hypertension, headaches¹², and even heart attacks and strokes¹³.

Online harassment is on the rise

Like workplace violence, online harassment is increasingly common in workplaces today. Digital tools have prompted harassment to happen in new ways—through emails, gifs, texts, video meetings, and chat feeds—but also more frequently, given the proliferation of online and hybrid work. In one recent survey by Project Include¹⁴, employees reported that since working remotely, they have experienced more frequent harassment based on their gender (26% of employees surveyed), age (23% of employees over age 50) and race or ethnicity (10%). EVERFI recently partnered with the HR Research Institute to do a survey¹⁵ of HR professionals, and asked how frequently discrimination, harassment, and bullying occurred.

- 29% of respondents agreed that colleagues are often bullied
- 20% said that colleagues are often discriminated against
- 19% cited frequent harassment

When those same leaders were asked if their organization trained employees to prevent these issues, many indicated that they do not.

- 39% do not provide training to stop bullying
- 28% do not address discrimination
- 22% do not train on harassment prevention
- 20% do not provide training in any of these areas at all

These gaps are particularly alarming given indicators that harassment is escalating, particularly in online environments.

TIP SHEET

Recommended Action Plan to Prevent Harassment and Discrimination

1

Update harassment and discrimination policies and training to include examples of online harassment.

Employees must understand that harassment will not be tolerated in any form, anywhere.

- TIP: Consider noting that harassing comments or behavior via chat, text, or video are prohibited. Perhaps include other remote work-specific guidance like “Think carefully before making comments about a person’s home,” or “Do not make jokes about being in bed while working.”

2

Implement objective, specific performance evaluation, recognition, and promotion criteria.

Often a staple of hiring decisions, documented criteria are powerful tools to ensure fairness and non-discrimination in all types of employment decisions.

- TIP: Using objective criteria and prompts boost equal opportunity and ensure that decisions don’t inadvertently disadvantage workers based on their location, identity characteristics, and more.

3

Train leaders to recognize and prevent discrimination and harassment.

Ensure training provides examples across all aspects of the employee experience.

- TIP: Educate leaders about how bias and discrimination can occur not just in interviewing and hiring decisions, but also in performance reviews, awarding development opportunities, and promotions. Also, teach leaders the skills to recognize and promptly address harassing behavior.

4

Train all employees on their role in preventing workplace harassment.

Employees play a huge part in supporting positive work environments and taking action when concerning situations arise.

- TIP: Harassment doesn’t recognize geographic boundaries, so it’s important to provide anti-harassment training to all employees, even if their state or city doesn’t require it. Also, include training on bystander intervention techniques: a critical set of tools that help all employees speak up safely—or seek help if needed – if they witness harmful, disrespectful interactions.

REDUCING BIAS AND EXCLUSION THROUGH DEIA EFFORTS

Finally, the U.S. Surgeon General's report outlined the critical role that diversity, equity, inclusion, and accessibility (DEIA) efforts play in promoting employee mental health. Reducing harms prompted by bias, microaggressions, and other exclusionary behaviors, while also taking proactive steps to ensure employees with different experiences, backgrounds, and accessibility needs are included can create strong feelings of belonging for all employees that support their positive mental well-being.

Potential bias and exclusion in today's work environment

Remote and hybrid environments can increase risks of exclusion and unfair treatment of employees.

For example, as employers continue their efforts to prevent the traditional forms of discrimination (such as discrimination based on race, color, gender, age, religion, disability, sexual orientation, and more), they also must be on the lookout for, and safeguard against, proximity bias in leaders and managers: consciously or unconsciously favoring employees who work onsite over their remote colleagues.

A recent study¹⁶ by Gartner found that 64% of managers view in-office employees' performance more favorably and are more likely to give them a higher raise than their remote colleagues, even though data indicated that it was the remote workers who were more likely to be the higher performers. In addition, a SHRM survey¹⁷ found that some managers view remote workers as less essential parts of the team. Taken together, potential differences in the performance evaluations and perceived value of remote workers' contributions compared to their in-office colleagues can lead to skewed ratings and unjustified decisions about raises, development, and promotions. This can be particularly risky if employees with certain protected characteristics opt for remote or hybrid working arrangements more frequently.

67% of supervisors admit that they consider remote workers more replaceable than onsite workers at their organization. - SHRM

How does DEIA support employee mental health?

DEIA initiatives can work to address and prevent workplace dynamics that can cause psychological harm to all employees. **Here's how it works:**

1

If an organization prioritizes and takes action to support inclusion and accessibility across the entire employee experience, this demonstrates that everyone is welcome and respected, and that their unique contributions are valued.

2

That inclusion work—particularly when combined with proactive education of leaders and employees—will also help reduce bias and prevent acts of exclusion and inaccessibility. These harmful interactions and exclusionary behaviors can cause painful feelings of isolation for employees.

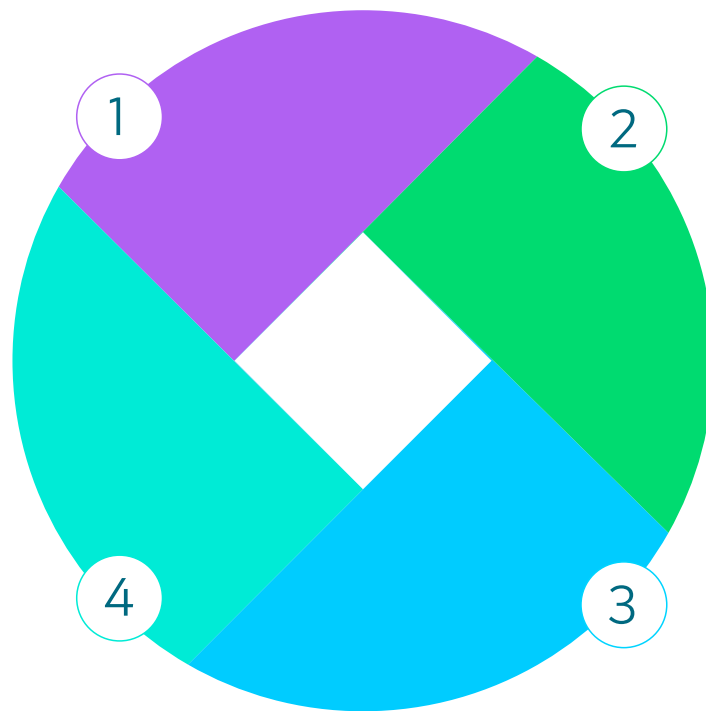
3

A reduction in exclusionary actions, biased statements and decisions can lead to increased feelings of psychological safety, social connection, and belonging.

4

The result? Less stress, loneliness, anxiety, and other mental health challenges because employees will feel supported, connected, and valued.

Prioritize Inclusion



Reduces bias, exclusion and inaccessibility

Results in less stress, loneliness and anxiety

Increases psychological safety, social connection, and belonging

Another key intersection point of DEIA and mental health: different identity groups face unique challenges at work and experience different mental health challenges. Data from various sources highlights this intersection. A recent survey²⁰ by Calm for Business shows certain employees experience greater challenges, and feel less supported, depending on their identity characteristics. When asked whether they feel down, depressed or hopeless more than half of the days each month or more:

- 50% of LGBTQ+ employees agreed
- 47% of neurodivergent employees agreed,
- compared to 33% of the general employee population.

The rates of agreement also differed by race/ethnicity as follows: Hispanic and Latino/a employees (43% agreed), Black/African American employees (42%), White employees (31%), and Asian American & Pacific Islander employees (28%).

Take, as another example, remote meetings. Meetings can create accessibility barriers for some people with disabilities who rely on lip reading; chat features and video cameras can pose challenges for employees who are neurodivergent. Research also indicates that women¹⁸, people of color¹⁹, and other groups may face other exclusionary behavior in virtual meetings.

Findings such as these counsel that workplace mental health strategies should not take a one-size-fits all approach. Different employee groups may well be having different experiences at work and may have different needs for mental health support.

TIP SHEET

Recommended Action Plan to Coordinate DEIA and Mental Health Work

1

Learn about and address the unique needs of different employees.

Seeking input from employees about their work experiences and needs through employee surveys or listening sessions can provide valuable information to guide inclusion and mental health initiatives as well as demonstrate your support.

- TIP: Consider having leaders solicit feedback from employee resource groups (ERGs, also known as affinity groups). Listen closely to the members' experiences and suggestions for improvement and report back about any steps taken as a result. Better yet, encourage leaders to visibly support and participate in ERGs.

2

Document protocols for handling accessibility/accommodation requests.

Workspaces, technology, and processes can create barriers for many employees, including employees with disabilities or who are neurodivergent.

- TIP: Outline a process for handling accessibility and accommodation requests and ensure all supervisors understand what to do if an employee needs or requests help.

3

Adopt inclusive meeting practices.

Meetings can be powerful moments of inclusion—or exclusion. Some employers are adopting a set of meeting practices that not only facilitate good communication across geography but also ensure accessibility and inclusion for all.

- TIP: [Download this inclusive meeting checklist](#) to help employers ensure all meeting participants can contribute fully and feel included.

4

Train all leaders and employees on how to act inclusively.

Leading organizations are equipping all employees with the skills to both be aware of potential bias and to take action to include colleagues in everyday workplace moments.

- TIP: Check to ensure that DEI training is practical and actionable. For example, teaching employees and leaders to consider religious holidays when scheduling team events or to solicit input from an employee who was interrupted or isn't participating in a meeting can have a tangible impact on supporting a culture of inclusion.

When organizations and leaders honor moments such as Women's History Month or Asian American and Pacific Islander Heritage Month, or acknowledge when a tragedy in the news impacts a particular group, employees who identify as part of those groups may feel even more included and supported by their organization. The next section in this guide will dive deeper into building this connection between DEI and CSR through employee engagement initiatives.

Building Connection, Community and Belonging

Because of the power that inclusive work environments and feelings of belonging have in supporting employee mental health, a key recommendation of the U.S. Surgeon General is creating cultures of inclusion and belonging.

This section will dive into how purpose at work is a key-driver in building connection, community and belonging that leads to employee well-being + provide strategies and examples from the Global Good Network™ for social impact and people and culture leaders to continue their collaboration to connect employees to meaningful work.

THE ROLE OF CSR IN PEOPLE AND CULTURE

Although often siloed organizationally, the work of HR, DEI, and CSR are inextricably connected. Each area has a critical impact on employee engagement and satisfaction, retention, and feelings of purpose and belonging. If you're new to understanding the role of CSR in people and culture and looking at employee wellness through a CSR lens, then don't worry, we have a whitepaper that dives into that topic, "CSR Strategies for Elevating Your Employees as Your Number One Stakeholder".



The Role of CSR in People and Culture + Employee Wellness through a CSR Lens

[LEARN MORE ►](#)

Why does purpose at work matter?

Many companies have long understood the external benefits of CSR to their communities and their consumers. There is extensive data and research²¹ on the ROI, consumer, investor and executive beliefs on the benefits of CSR. Employees are loyal, highly engaged and proud of where they work when they feel a sense of purpose.²² The Purpose Under Pressure research study²³ released jointly by Carol Cone ON PURPOSE, The Harris Poll and Allison+Partners examined the benefits of strong corporate purpose from an employee lens.

- **91%** of employees believe their company's purpose made them feel like they were in the right place
- **84%** of employees will only work for purpose driven brands
- **86%** believe having meaning in their work is more important than ever.

How does purpose enhance personal well-being?

Purpose has extrinsic and intrinsic benefits on us as individuals.

Dr. Richard Davidson is internationally renowned for his research²⁴ on well-being and he defines the 4 pillars of well-being as:

Awareness

The ability to notice your thoughts, emotions, and impulses clearly and truly be present at work and in your relationships.

Connection

Cultivating qualities like appreciation and kindness strengthens your positive connections with other people. This will increase your resilience and boosts well-being.

Insight

Get curious, notice how your thoughts and emotions influence the way you see the world. Understanding how others experience the world will help you stay curious. This can help you turn challenges into opportunities for growth.

Purpose

A sense of purpose is what helps you see the bigger picture and stay genuinely motivated.

Employee engagement activities that drive social impact through service and giving will tie to all 4 of these pillars. I'm sure you can think of a time when you gave back that made you more aware of the communities affected by a societal issue, provided insight to what can help bring change, and allowed you to connect with people. These experiences foster a sense of purpose for those contributing to making an important impact. Diving into volunteering more specifically, we pulled out three individual factors from various research studies on the connection to personal well-being.

Job Performance and Leadership Development²⁵ – Employees gain increased efficiency from using their skills to solve problems and deliver results for a nonprofit organization. IT needs, marketing needs, or other skills-based projects for nonprofits require employees to use their talents in new ways that probably wouldn't happen in their day-to-day at your company.

Need Satisfaction – Research has shown that volunteer participation increases need satisfaction from relatedness and competence.²⁶ High need satisfaction is related to higher job satisfaction and commitment.²⁷

Mental Health and Well-being²⁸ – Psychologists call it the helper’s high. Volunteering in general has shown to improve mood, keep people active and reduce stress levels, all having a significant impact on a person’s health. Research from Project Help²⁹ supports this connection to well-being, specifically looking at the impacts of volunteering on mental health:

- 78% say volunteering reduces stress levels
- 96% say that volunteering enriches their sense of purpose
- 94% say volunteering improves their mood

The UK Mental Health Foundation³⁰ identified our connection to other people and our community as fundamental to protecting our mental health and combating loneliness.

CONNECTING DEI AND EMPLOYEE ENGAGEMENT INITIATIVES THROUGH CSR

A good place to start building a connection between DEI and CSR is through how your company will celebrate holidays and observances, looking for ways to tie service and giving to moments that are truly meaningful to your people and their identities.

Here’s how: company-sponsored service activities and fundraising efforts for communities in need are great ways to build awareness about, and deepen empathy for, the experiences of people from a variety of backgrounds. What’s more, volunteer efforts often prompt employees to work alongside colleagues who are different from themselves, bringing employees together who normally may not work or socialize together. These powerful personal connections can help support understanding across your employees, awareness of different experiences and perspectives, and ultimately allyship for others—all of which create an environment of inclusion and belonging, a central goal of DEI work.

Moments that Matter

Your company can demonstrate its commitment to giving back while creating a more inclusive world for all. Awareness months and holidays not only give organizations the chance to promote employee learning and conversations internally, but they also provide an opportunity to align CSR activities to employee interests. From Giving Tuesday to Black History Month to International Women’s Day, these “Moments that Matter” throughout the year can be:

- catalysts for employee engagement in causes that are meaningful to them
- tools for building employee connection and belonging

MOMENTS THAT MATTER

there
• IS NO •
Planet B



TIP SHEET

Recommended Action Plan for Supporting Moments that Matter

1

Find out what matters to your employees.

The key here is to give your employees a voice and a choice. Disaster relief, climate change, and cancer research, are all serious and important causes to advocate for. But what do your employees care about and how do you harness the power of collective impact to make a difference? One element to program success that we see across companies in the Global Good Network is the ongoing collection of qualitative feedback.

- TIP: Employee focus groups, employee resource groups and/or committees are a great place to collect qualitative feedback from highly engaged employees that provide representation across the workforce in terms of demographic, age and tenure within the organization. Consider using these groups to hear first-hand what team members need to know to get involved and what they want to make an impact towards.

2

Set realistic goals and work backwards from there.

How many giving or volunteering campaigns, events or days of service can your employees and CSR team realistically commit to within a year? How many of the holidays, observances and awareness months can you plan education and activities around? Large team volunteer events of 200+ employees can take up to 6 months of advance planning with nonprofits partners.

- TIP: Download our worksheet for [Designing Impactful Employee Volunteering](#) which includes a timeline for planning by employee group size.

3



Educate. Collaborate. Elevate. Communicate. Activate.

Our 5-step framework to support any Moment that Matters, a calendar of cause and DEI-related awareness days in the year for the U.S., Canada and the U.K. and a campaign checklist are all linked on one landing page.

[LEARN MORE](#) ►

4

Setup measures for success.

Make sure you have key questions in your employee engagement surveys that assess how your employees feel about your CSR work. Great Places to Work²² has examples of three questions on an employee survey that can indicate how your employees feel about your purpose and predict turnover regardless of job type or generation. Your questions can also measure how employee engagement efforts affect employee well-being. At Blackbaud, 82% of our employees surveyed said volunteering affects their well-being³¹.

- TIP: Track giving and volunteer hours across the company so you can share back the collective impact the team is making. Tracking progress can provide a way to communicate success, tell your story to prospective employees, and provide insights into how to shape your program for the future. Once you've got a baseline of outputs, you can start to measure your social impact and we've got a [roundup of resources](#) to help you get started.

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