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The Hybrid Workplace Wellness Playbook for Grantmakers

Creating and Sustaining a Culture of Well-being for Grantmaking Professionals in the Hybrid Workplace

BY MEICO MARQUETTE WHITLOCK

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Introduction

Over the past few years, we've experienced a collective trauma that has dramatically changed how we approach life and work. As a result of the COVID-19 pandemic, we're grieving the loss of loved ones and a way of life that will never return. The world has changed and will continue to evolve as we enter the next phase of the pandemic.

There are many unanswered questions about what the future of work will look like for grantmaking professionals. But here's what we do know: there is no going "back to normal." Even as we settle into the next normal, the anxiety most of us felt during the first few years of the pandemic will not disappear magically. Stress and burnout will undermine our recovery if we don't make personal and workplace well-being an urgent priority.

But how do we avoid slipping into old norms that won't work for us today? How do we use this as an opportunity to create a better workplace culture for everyone, whether we're working virtually or in person or both?

That's where this playbook comes in. But let's be clear: we don't have all the answers. No one does. What we're experiencing continues to evolve, so we must build the airplane while flying it.

The good news is grantmaking professionals are resilient. This isn't your first time facing massive change and disruption and coming out on top.

While this playbook won't miraculously make things go back to the way they were or solve every pandemic-related problem on your plate, it will provide the following:

- A summary of the latest research and trends on the future of work in the post-pandemic workplace

- Key lessons we've learned from the pandemic and practical shifts to create sustained culture change that works better for everyone today

- Practical strategies for activating and sustaining a healthy and vibrant culture in the post-pandemic workplace for the long haul.

Who Is This Playbook For?

This playbook is for professionals committed to making a positive difference in their communities through grantmaking. We know your life and work have been disrupted by the events of the last few years. We also know the need for what you do has never been greater.

Why This Project?

We've heard from many grantmaking professionals about how today's changing world has resulted in increased stress, uncertainty, and social isolation, as well as a decrease in overall well-being. You are undoubtedly doing great work, even while looking for new tools and resources around the latest grantmaking best practices. But you can't give your best if you're not at your best.

This playbook supports you in balancing your well-being, work, life, and the tech tools that seem to be getting in your way more often than they help you focus on mission-critical activities.

We won't bore you with complicated data and case studies. We know you need practical strategies and resources to help you create sustained balance in your life and work so you can lower your stress level and focus on getting the important things done.

Who Is the Author?

Meico Marquette Whitlock is the lead author of this playbook. For more than two decades, he has worked in the nonprofit and public sectors leveraging technology to create positive social change. Today, Meico helps changemakers create work-life and tech-life balance so they can do their best work while living their best lives. Through speaking, training, and coaching, he facilitates transformative experiences that foster well-being in a hyperconnected and distracted world. He is the founder and CEO of Mindful Techie and the author of the Intention Planner. Meico is also a certified mindfulness teacher focusing on trauma-informed mindfulness for underserved communities.

Introduction: Next Steps

Before you dive into the rest of the playbook, take a moment to reflect on these questions:

1. What has been my biggest challenge with well-being during the pandemic?

2. What is one thing I believe will help me improve my well-being at work right now?

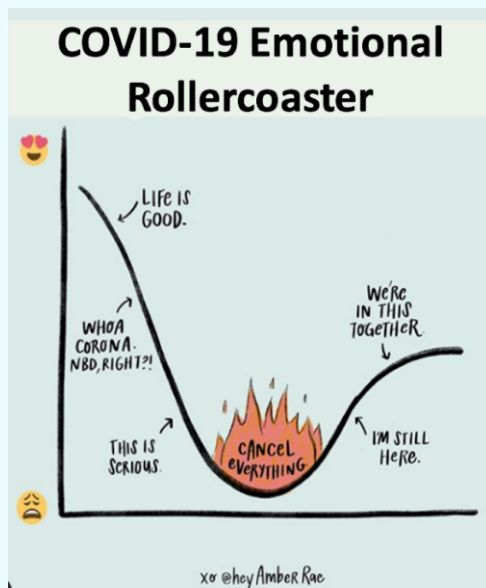3. What is getting in the way of me improving my well-being at work?

The Challenges

You're not alone, and you're not imagining things. The pandemic has contributed to a number of stressors that have made finding balance and getting things done more challenging. There are five key factors contributing to this stress.

The good news is grantmaking professionals are resilient. This isn't your first time facing massive change and disruption and coming out on top.

THE IMPACT OF COVID-19 ON WELLBEING

COVID-19 Emotional Rollercoaster

LIFE IS GOOD.

WHOA CORONA. NBD, RIGHT?!

THIS IS SERIOUS.

CANCEL EVERYTHING

WE'RE IN THIS TOGETHER

I'M STILL HERE.

xo @hey Amber Rae

Uncertainty

Isolation

Work/Life Balance

Tech Overload

Prolonged Uncertainty

The past few years have created prolonged uncertainty and disruption, which make planning challenging. Too many unknowns for too long creates stress and anxiety that eventually takes a mental, emotional, and physical toll on us. We thrive with routines and having a sense of control over our life and work. An absence of predictable routines and personal control negatively impacts our mental health. In an August 2021 survey by the American Psychological Association, nearly two-thirds of people indicated uncertainty over what the next several months will bring is a source of stress. About half said the pandemic has made planning for the future impossible. Can you relate?

Social Isolation

Physical distancing has prevented us from having the type of human-to-human connections that help us thrive. Working in the post-pandemic workplace can feel lonely. Physical distancing and remote work can be barriers to forging new social connections and re-building pre-existing ones. In a 2022 Blackbaud survey of grantmaking professionals, more than 45 percent of respondents noted they felt less connected to their colleagues than before the pandemic. A March 2022 Microsoft Worklab survey found that 55 percent of hybrid employees and 50 percent of remote employees felt lonelier at work than before going hybrid or remote. Do you feel more or less connected to colleagues since the start of the pandemic?

Work-Life Imbalance

Boundaries between work, life, and even the days of the week have been blurred beyond recognition. And it's become increasingly harder to manage expectations from a distance. In a 2022 Blackbaud survey of grantmaking professionals, more than 70 percent of respondents noted the amount of time they spend working has increased compared to before the pandemic. How has the amount of time you spend working changed since the start of the pandemic?

Workplace Burnout

Mental, emotional, and physical exhaustion from chronic work-related stress and overwhelm have skyrocketed in recent years. This exhaustion can stem from having unclear goals, unmanageable workloads, unreasonable time pressures, limited resources and support, lack of flexibility, and interpersonal conflicts. The result is more burnout at work. In fact, in 2019, the World Health Organization recognized burnout as an "occupational phenomenon" in the International Classification of Diseases (ICD-11). Symptoms include feelings of energy depletion or exhaustion, feeling demotivated and detached from your work, and reduced overall productivity and efficacy. According to an American Psychological Association 2021 Work and Well-being Survey, nearly 3 in 5 employees reported experiencing symptoms of workplace burnout. Have you experienced symptoms of burnout over the past few years?

Technology Burnout

The onslaught of using video conference platforms and other virtual tools for everything from work meetings to family holiday celebrations has resulted in overload, burnout, and screen exhaustion. More than 90 percent of grantmaking professionals surveyed by Blackbaud in 2022 indicated their technology and internet use increased during the pandemic. Has your technology use during the pandemic impacted your overall well-being?

Challenges: Next Steps

Key Takeaways:

1. You're not alone.

2. The pandemic contributed to a number of stressors that have made finding balance and getting things done more challenging. Key stressors include prolonged uncertainty, social isolation, workplace burnout, work-life imbalance, and technology burnout.

Reflection Questions:

1. Since the start of the pandemic, how connected do you feel to colleagues?

   a. More
   b. Less
   c. Same as before

2. Since the pandemic, how has the amount of time you spend working changed?

   a. Increased
   b. Decreased
   c. Stay the same

3. Since the start of the pandemic, how has the amount of time you spend in front of screens (e.g., computers, tablets, smartphones, etc.) changed?

   a. Increased
   b. Decreased
   c. Stayed the same

Creating an Organizational Culture of Well-Being Post-Pandemic

Addressing workplace well-being long-term requires addressing the root causes at a systemic level. For grantmaking professionals, ideally, we would start at the organizational level by holistically designing support systems that address the specific forms of stress and anxiety we're experiencing. This means well-being in the workplace isn't just an individual concern. It's also the responsibility of the organizations we serve. This responsibility requires us to recognize we can recover from and prevent burnout, but only when we are intentional about our approach to well-being at all levels of our organization.
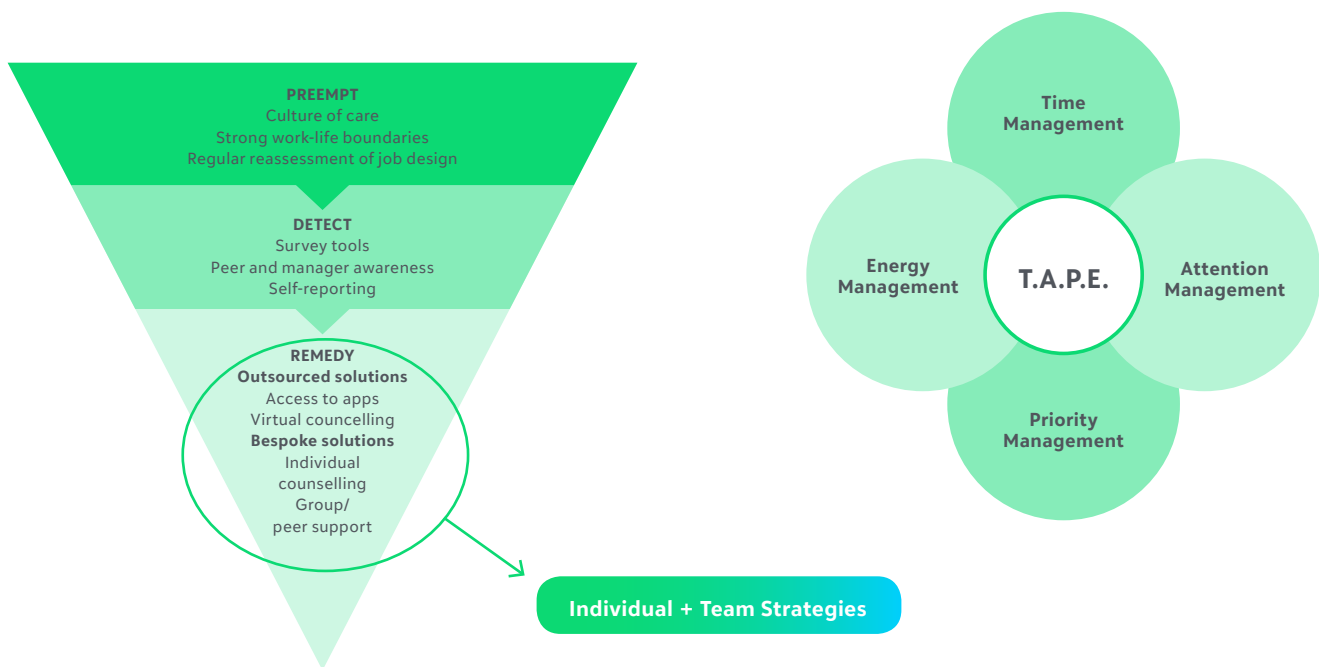
The following framework for addressing well-being challenges in the workplace has been adapted from a model developed by University of Cambridge professors Ben Laker and Thomas Roulet.

This model provides an effective way for leaders to think about preempting overwhelming work stressors before they become a crisis. This approach requires proactively addressing work stressors by addressing the conditions that generate them in the first place, detecting emerging issues, and remedying identified issues.

Unfortunately for many of us, in the immediate term, we may not be able to influence long-term changes in our organization's culture. This means we have to focus on the things we can control at the individual and team level while pushing for organizational change over the long term. For this reason, the best practices and solutions we offer center on the individual and team experience.

They fall into four areas: time management, attention management, priority management, and energy management. Collectively, these four areas are known as a T.A.P.E.

ADDRESSING WELL-BEING CHALLENGES IN THE WORKPLACE

PREEMPT
Culture of care
Strong work-life boundaries
Regular reassessment of job design

DETECT
Survey tools
Peer and manager awareness
Self-reporting

REMEDY
Outsourced solutions
Access to apps
Virtual councelling
Bespoke solutions
Individual counselling
Group/ peer support

Individual + Team Strategies

Time Management

Energy Management

T.A.P.E.

Attention Management

Priority Management

Well-Being Framework: Next Steps

Key Takeaways:

1. Workplace isn't just an individual concern. It's also the responsibility of the organizations we serve.

2. We may not be in a position to influence long-term changes in our organization's culture as one individual. BUT we can focus our attention on the things we can control at the individual and team level while pushing for organizational change over the long term.

Action Step:

Take a moment to assess your current workplace wellness score by completing this short quiz.

"This responsibility requires us to recognize we can recover from and prevent burnout, but only when we are intentional about our approach to well-being at all levels of our organization."

Best Practices and Solutions

The following best practices provide solutions to achieve and maintain greater well-being in the hybrid workplace. This isn't an exhaustive list but rather a collection of what we believe at the moment is the most relevant solutions for grantmaking professionals in today's changing workplace.

Keep in mind the following:

- These best practices aren't one-size-fits-all. What works for you and your team may be different for someone else—and that's perfectly okay. Try them on. Make adjustments. Or leave them behind if they aren't for you.

- The process of achieving optimal workplace well-being isn't a destination. It's an ongoing practice versus a one-time flip of the switch. And it may change based on the seasons of your life and work.

- Along the way, you may make mistakes. You may not get it right the first, second, or third time. And guess what? That's okay, too. Keep going anyway. And remember to treat yourself and your colleagues with kindness, grace, and compassion as you embark on the next phase of your well-being journey.

Ready to dive in? Let's go!

Tips for Individuals

Walk, Don't Run

Often when faced with what seems like a never-ending to-do list and not enough time and resources, you might feel the urge to speed up and try to do as much as you can as quickly as you can. But this approach can be a recipe for disaster. Why? It's partly because of something I learned about how first responders are trained to respond when arriving at the scene of an accident. They're taught to walk and not to run. Why?

Running is risky. If first responders trip, fall, and get injured, they cannot help the person who needs them.

Running makes it harder to keep your cool and operate at peak effectiveness because your stress hormone levels spike. You need to be able to think clearly and act deliberately, decisively, and expeditiously. It's hard to do that if you're all riled up.

Consider what it would mean to be a first responder in your life and work. What if you slowed down and, instead of rushing, took the time to deliberately consider what's important right now, what can wait, and what needs to come off your to-do list altogether? This won't make your workload magically dissipate, but it will help you focus more on the important things that are in your control.

Make a Plan for Your Day and Week

Survey data show one of the biggest distractions in the workplace is a lack of clarity about what to focus on at a particular moment. Consequently, when distracted, we may find it challenging to get back on track because we're not clear about what's important.

You can correct this by controlling what you can control. Take a few moments at the beginning or end of each day and week to map out your vision for success and the priorities that will help you get there. You can think of this process as setting the address for your intended destination in your GPS. Without a destination, you drive around for hours and end up in no place in particular. This is like being busy without making a real impact.

Research shows that when you do this process by hand, you are more likely to remember and follow through on your intentions and priorities.

This is one reason I created the Intention Planner, a daily planner to support changemakers like us in getting the important things done with intention.

Know Your Zoom Number

You've probably seen advertisements for the Sleep Number bed. It's the one where you change how firm or soft you want your mattress to feel by adjusting the Sleep Number setting. What if you could do the same for the volume and length of meetings you participate in? This cap would be your Zoom number.

In other words:

- How many meetings (virtual, hybrid, or in-person) should you have in a day?

- How long should they be?

- Which meetings shouldn't be meetings?

There's no correct answer. Your Zoom number will vary based on the nature of your work and may also fluctuate based on the season. A great place to start with figuring out your number is to:

1. Identify your top priorities for the week. Start with your top two.

2. Estimate how much time you need to complete them.

3. Review your calendar and see how many meetings you have scheduled this week and their combined length. Does the number and length of the meetings leave time for you to complete your top priorities? If not, your de facto Zoom number may be too high.

If you want to lower your Zoom number, try time blocking your non-meeting activities, such as writing a grant proposal or working on the budget. Time blocking can help you carve out the space to focus on your top priorities. It's a time management method that asks you to divide your day into blocks of time for each activity or priority. For example, this week, you need to spend an hour working on the agenda for your next board meeting and two hours researching a potential program area. At the beginning of the week, set appointments on your calendar for the allotted time, and make sure the appointments are set to "busy." That way, when someone

> "But the truth is, our time, energy, and attention spans are limited in comparison. And if you don't get control of your schedule, it will control you."

tries to book a meeting with you, you already know those two priorities are accounted for in your schedule.

For meetings that are absolutely necessary, you can focus on strategies to make them more impactful and productive, such as using these templates for more intentional meetings.

The volume of virtual meetings has increased alongside our reliance on tools like Zoom to sustain collaboration and connection in a remote-first world. But the truth is our time, energy, and attention spans are limited in comparison. And if you don't get control of your schedule, it will control you.

Practice Being Socially Distant from Your Digital Devices

When working, eating, and sleeping, we have a perfect opportunity to be socially distant from our devices. These breaks allow our brains and bodies to recover from the stress of being constantly connected.

- Start by charging your devices outside your workspace. Add tech breaks to your calendar to check in on any important calls or messages throughout the day.

- Turn off notifications for non-mission-critical apps.

- Put away your devices during meals.

- Buy an actual alarm clock and charge your devices outside your bedroom so you can get uninterrupted rest at night

Establish Your Rules of Engagement

One of the biggest challenges we face with our increased workload is unwritten assumptions about when we need to be available for work. We can address this and begin establishing work-life balance by having explicit conversations with our teams to address key questions such as:

- Which hours will you be available for work each day?

- Which hours will you be available for life outside of work?

- Which tools should colleagues use to reach you for urgent matters? What about non-urgent issues?

- What's an urgent matter?

- How soon should someone expect a response from you, depending on the level of urgency?

Establishing and communicating these boundaries removes the guesswork from when and how you are available for your work and personal life. The boundaries can also reduce any anxiety you may feel about needing to be on and available 24/7.

Create a Start-and-Stop Routine and Add it to Your Calendar

Too many of us check emails, respond to text messages, scroll through social media, and go through our mental checklists before even rolling out of bed.

We spend our days in back-to-back meetings and sitting behind a screen all day.

You can break this pattern by identifying a start-and-stop ritual for your day. This is something you do for yourself before jumping into your day, like having a cup of tea, walking the dog, or doing yoga. Similarly, having a stop ritual, like putting away your work computer or starting dinner, helps bookend your days.

If your time is limited or you're overwhelmed with where to start, consider starting with just five minutes for yourself at the start and end of the day.

Solutions for Individuals: Next Steps

Key Takeaways:

1. There is no one-size-fits-all solution for your workplace wellness challenges. What works for you and your team may be different for someone else—and that's perfectly okay.

2. As you try different strategies, you may make mistakes. And guess what? That's okay, too. Remember to treat yourself and your colleagues with kindness, grace, and compassion as you embark on the next phase of your well-being journey.

Action Step:

Identify one solution you will commit to putting into practice to improve your personal well-being in the workplace over the next 30 days. This can be one of the recommendations from this section or something you learned about elsewhere.

"If your time is limited or you're overwhelmed with where to start, consider starting with just five minutes for yourself at the start and end of the day."

Tips for Teams

Acknowledge the New Reality

The way we live and work has changed. The processes that worked for us two years ago are not effective now. Although there's a lot we don't know and can't predict, we can use our experience from the last few years to inform how to make things work better for us right now. One way to do this is by remembering the sometimes overlooked and profound power of small gestures. We're often so focused on the bigger picture we forget little things like the simple act of acknowledging change, disruption, newness, and uncertainty even if we don't have all the answers. Taking the time to recognize and acknowledge what is helps create a shared understanding and common sense of safety. This can be as simple as sharing the facts, being honest (but kind) about a situation, and acknowledging everyone's emotions.

This type of acknowledgment is linked to higher fulfillment at work. It creates a healthier work environment, helps employees stay motivated because they feel seen and heard, and have a sense of certainty even amid seeming chaos.

Create a One-Page Hybrid Workplace Well-Being Plan for Your Team

A McKinsey study on workplace burnout found that one thing burned-out employees have in common is leaders who have yet to get specific about the future of hybrid work. Forty-seven percent of employees who identify as burned out feel a lack of clear vision about work in the post-pandemic world causes concern or anxiety. Anxiety is known to decrease work performance, reduce job satisfaction, and negatively affect interpersonal relationships with colleagues, among other ills.

One way to mitigate this is to create a hybrid workplace well-being plan. The plan should focus on things you can control at the team level and include items such as well-being practices, recommendations, and resources that are available at the team level in your organization. Create your plan with input from staff and be sure to communicate it. This is probably the single most important thing you can do to reduce stress and burnout at the team level. If your team already has one in place, it may be time to revisit and revise it. If your organization doesn't have a well-being strategy, your one-page team plan could be the foundation for a broader organizational strategy.

If you don't have a plan, you can get started by collectively brainstorming and answering these key questions:

1. What's our vision for what we want well-being to look like for our team and/or organization over the next 18 months? This can be a few sentences to a paragraph and can evolve over time.

2. What are the biggest challenges our team is currently facing? This information could be collected via a short anonymous survey, one-on-discussions, or during a team meeting. In terms of solutions, it may be helpful to start by focusing on the top two challenges.

3. What resources do we currently have available to improve workplace well-being? Examples might include health insurance that covers mental health services, an employee assistance program that provides resources for caregivers, or a budget for professional development.

4. What strategies or solutions can we implement right now based on the resources we do have?

5. What resources do we need to improve the well-being of our team that we don't have currently?

Be Digitally Fluid

According to author Beth Kanter, digital fluidity is all about the ability to work effectively when your team is in a mix of virtual and in-person environments. You may be in-person one day and virtual the next day. You may have some of your team in the office and others working from home. You and your team must become fluent in both synchronous and asynchronous work styles. Knowing when each work style works best for you and your team and when you need to switch things up is critical to having a healthy, hybrid workplace culture.

Working asynchronously or exchanging information between two or more people without requiring an immediate response allows everyone to contribute on their own time while still getting the work done. For example, working as a team on a large report using a tool such as Google Docs allows each person to work on it at different times.

Working synchronously or when two or more people exchange information in real-time can allow for a more rapid exchange of ideas, lessen misunderstandings, and help build relationships. The downside is that an overreliance on this style can lead to Zoom fatigue and being less productive overall. However, using tools like Loom or making an old-fashioned phone call can do the trick.

Have Intentional Meetings

The increase in remote work has been accompanied by an increase in meetings, but it doesn't have to be this way. Before scheduling a meeting, pause to consider:

- Is this meeting really necessary?

- What challenge am I trying to solve, or what question am I trying to answer?

- Are the right people in the "room?"

Consider meetings as a last resort. If you're unable to answer these questions above, it could indicate a meeting may not be the best way to achieve your goal. It may be worthwhile to consider if there are other ways to get what you need in the short-term, such as a short email or phone call.

Have Speedier Meetings

If you determine a meeting is absolutely necessary, have speedier meetings by changing your calendar settings to shorten the default length of your meetings by 5 to 10 minutes. If you have 30-minute meetings as your default, your calendar will block 20 or 25 minutes instead. This gives you and your team a buffer, so you're not rushing directly from one thing to the next.

Co-Work

Working in a hybrid workplace doesn't have to be a lonely and isolating experience. Whether working together in person or virtually, co-working allows you to collaborate in real-time, get additional accountability for completing tasks, and the ability to deepen connections with colleagues and external stakeholders.

Co-working generally happens when two or more people gather to work independently alongside one another in the same space. Whether you're working at one of the popular co-working spaces in your area or meeting up with a friend at a coffee shop to work, there can be several benefits.

Although virtual co-working is different from being in-person, there are ways it can be replicated virtually, including through platforms like Focusmate or coordinating a work session on your own with a friend or colleague using your virtual meeting platform of choice.

For platforms like Focusmate, you're paired with someone you don't know, and then you:

1. Decide when to co-work.

2. Launch your video session. Start each session by greeting your partner and declaring your goal.

3. Get your work done while working quietly in tandem with your partner.

Create Energizing Team Rituals

Rituals are powerful, intentional, and small acts done routinely and that carry meaning. Rituals can support us in boosting personal productivity, creating a sense of community, building relationships in the workplace, and reducing stress. Hybrid workplace rituals might include facilitating "cameras optional" virtual meetings, opening meetings with icebreakers or mindfulness exercises, or celebrations for milestones such as birthdays, promotions, and fundraising records. Be sure to get feedback and ideas from staff to help create buy-in.

Solutions for Teams: Next Steps

Key Takeaways:

1. Get feedback and ideas from staff before implementing team-wide changes. This helps create buy-in and a higher likelihood of long-term success.

2. The process of achieving optimal workplace well-being isn't a destination. It's an ongoing practice versus a one-time flip of the switch. And it may change based on the seasons of your life and work.

Action Step:

Identify one solution you will commit to putting into practice as a team to improve well-being in the workplace over the next 30 days. This can be one of the recommendations from this section or something you learned about elsewhere.

Additional Tools and Resources

One-Page Team Hybrid Workplace Well-Being Plan Questions to Get Started

If you don't have a plan, you can get started by collectively brainstorming and answering these key questions:

1. What's our vision for what we want well-being to look like for our team and/or organization over the next 18 months? This can be a few sentences to a paragraph and can evolve over time.

2. What are the biggest challenges our team is currently facing? This information could be collected via a short anonymous survey, one-on-discussions, or during a team meeting. In terms of solutions, it may be helpful to start by focusing on the top two challenges.

3. Which resources do we currently have available to improve workplace well-being? Examples might include health insurance that covers mental health services, an employee assistance program that provides resources for caregivers, or a budget for professional development.

4. What strategies or solutions can we implement right now based on the resources we do have?

5. What resources do we need to improve the well-being of our team that we don't have currently?

- Work-life wellness assessment

- Digital wellness assessment

- Rules of engagement template

- Hybrid/intentional meetings guide and template

Start. And Start Again.

Addressing workplace well-being long-term requires Creating and sustaining a culture of well-being for individuals and organizations is about being at peace with the natural ebbs and flows of life.

Life doesn't stand still. Your well-being needs will evolve as your life does. Finding what you need for balance is an ongoing practice that shifts with the seasons of your life and work. It's also not one-size-fits-all. What works for you may not work for someone else or another organization.

If you're struggling with where to start, know you're not alone. Take a moment to pick one small thing you can do to start. And then keep starting. Before long, you'll be well on your way to a sustainable culture of well-being for yourself, your team, and your organization.

Where Do We Go from Here?

The best way to start is to start. Start small by committing to try one new thing to improve the well-being for yourself or your team over the next 30 days.

Keep us updated on your progress! We'd love to hear from you at foundations@blackbaud.com or using #grantmakerwellness on social media.

Lastly, if you've found this resource helpful, we encourage you to share it with colleagues and other organizations.