

## MBC signatories call 20 January 2021

**Attendees** – Richard Martin (RM) and Lisa Swinney at byrne-dean were joined by over 50 participants. In view of the number of those participating we haven't listed all attendees by name.

We welcomed representatives from PGIM, VISA and Zebedee Capital Partners to the MBC signatory group.

**1. Update from RM on recent MBC activity.** In addition to signatories' own activity: RM, Mary Peterson (Addleshaw Goddard) and Becca Labib (Pinsent Masons) spoke about the MBC at The Investment Association's Workplace Wellbeing virtual event on 18 January. The IA is the trade body and industry voice for investment managers.

Internationally, the Singapore Law Society continues to promote the MBC to its members. In addition to the broader Law Society, their Young Lawyers are keen to harness the Charter specifically for their group. Events and conversations are ongoing in the region.

Through PLMJ there is an event with the British-Portuguese Chamber of Commerce to introduce the Charter on 2 February.

David McCahon (Barclays) and others are speaking in relation to the Charter at the legal sector roundtable on workforce mental health hosted by the City of London Corporation.

Dentons recently organised workshops involving themselves, Eversheds, Addleshaw Goddard and their mutual client Network Rail. The practical workshops addressed challenges that those working together across those teams are facing, creating a forum in which those challenges could be aired and looking at how to meet them. An interesting and rich discussion.

Richard Reade gave a quick update on Coats' experience to date. Within in-house counsel the Charter launched well, and did change their working habits, but they found it hard to get traction in the wider business. Unbeknown to them their HR team had been working with their health insurers independently on management of sleep, stress and exercise via a portal. The in-house team have managed to dovetail with these efforts and have put both projects into Coats' diversity and inclusion programme – giving it profile within an established network rather than creating a new process for mental health. The pandemic has served as a springboard to drive the initiative.

## 2. MBC Charitable Incorporated Organisation

The formal application to the Charity Commission remains a slow process. The application has reached the second stage (positive news - some applications are rejected before this stage) but unfortunately the Commission have highlighted a significant backlog of applications.

We have two further trustee volunteers, Hanim Hamzah (ZICO Law) and Bola Gibson (Osborne Clarke), and so have a full cohort. We are presently combining the working group with prospective trustees as a consultative body to represent the signatories' interests.

We are conscious, from a practical financial perspective, that if the CIO isn't incorporated before the financial year end, there may be problems for signatories who have budgeted for the current year. We are planning for the possibility of the CIO not being in place and looking at a facility to invoice on

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account. If there are budgetary timing concerns please let us know. In terms of self-certification of membership fee based on size of organisation, those who haven't self-certified should please let us know the size of their relevant employee base.

### 3. MBC website

Some news on an upgrade to the MBC website. The current website was created in 2019 to share basic information and allow people to get in touch, the intention being that it would be adapted and refined in due course. An opportunity has arisen to do that within the next few weeks, which the working group have discussed and agreed to.

On a practical level the new website will be built in user friendly webflow and be editable in-house, reducing ongoing costs and reliance on website consultants for edits. Experience wise, there will be both public facing and members' areas. The public area will be a refreshed version of the current site. The members' area is intended as an MBC community hub; a repository for minutes, notes and documents that is intended to reduce email traffic and provide easier access to documents. Alongside that we aim to create an MBC forum where organisations can interact day to day – asking questions and sharing information in real time. It has been suggested that this is hosted on MS Teams.

The website will be built throughout February. One of Pinsent Masons' MBC Champions has volunteered to give input and a signatory point of view throughout the process. If anyone has any thoughts or suggestions on website content and functions please get in touch.

It was suggested that having an IT/technical expert available would be useful to answer IT questions and guide us eg around whether architecture questions will represent group policy or individual preference issues.

RM reminded the group that the Barclays tech team are interested in connecting with other tech teams to discuss their area's particular MBC perspectives and issues. If there is interest from other organisations for tech teams to collaborate please let byrne dean know and we will make introductions.

### 4. Updates from signatories:

#### Howden Employee Benefits & Wellbeing – Cheryl Brennan

Howden signed the Charter in early 2020, having been introduced through the annual Wellbeing for Lawyers Conference. Howden is an Employee Benefits & Wellbeing business that provides corporate clients with employee benefit broking and consulting, as well as market leading health and wellbeing solutions. They knew they needed to do more for their own employees and the Charter gave them the framework to do so and deliver cultural change within the business. They operate in a traditional 'broking' sector where poor lifestyle behaviours and hard-nosed attitudes have dominated the industry for decades although they are seeing recognition in the market that maintaining the status quo is no longer viable.

The pandemic has acted as a catalyst for transforming their approach. They reviewed their communications with their people, ensuring they were aware of the support available and knew how to access their range of benefits and support networks. They reevaluated the delivery of training sessions to be more inclusive and to recognise the challenges of home working (and indeed home

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schooling). All initiatives and messages were driven by all levels in the business - the value of Executive Sponsorship and support cannot be undervalued.

Smart meetings and emails – they have adopted remote working practices and have challenged the thinking of more traditional leaders within the business. For many employees this has led to higher productivity and a better work life balance. They put communication policies in place to mitigate the saturation of communication through multiple platforms (whatsapp, email, teams, zoom, text, workplace). They have addressed meeting and screen-time overload via some simple practices that are embedded within the Charter’s ‘respecting rest periods’ eg a policy of no internal meetings from 12.30 to 2pm during winter to ensure that their people could use daylight hours to exercise - empowering employees to push back and decline meetings.

Questions they have asked themselves:

- 1) How do we take the key elements of the Charter and ensure they are the foundations upon which we can push *further* to drive cultural change on a sustainable and long-term basis?
- 2) How do we *meaningfully* commit to the elements of the Charter that require us to make performance against the Charter and how this becomes a natural part of any discussion rather than a footnote to an agenda

They have initiated an assessment of mental wellbeing performance as a baseline starting point and on an on-going basis using their Wellbeing and Data Analytics business. Undertaking qualitative and quantitative measuring of health and wellbeing data, workforce data, benefit data and a review of policies and adopted employee focus groups. Through this they have been able to benchmark against best practice. This enabled them to meaningfully assess the impact of the Charter and embed culture change.

- Mapping out our current offerings to identify gaps/improvement
- Identifying health risk factors and key concerns
- Listening to employees, partners and clients
- Understanding cultural elements that were impacting on employee health and behaviour change
- Identifying key focus areas to drive our strategy
- Creating dashboards that enable us to monitor risk factors and performance on an on-going basis.

They are then able to monitor the success & impact of wellbeing programme and initiatives, feeding into business cases, board reports, and tender exercises. Some actions they have taken as a result of their findings to date are:

- A total overhaul of their Agile working policy
- Rolling out Thrive (a mental health app) to all employees last summer
- Rolling out Redarc – a mental health and critical illness employee support service
- Identifying risk factors and support needed for our Mental Health First Aiders and put support in place for them and our wellbeing champions using a team of mental health nurses

There remains the challenge that a minority of clients, the exceptions, have working practices that significantly contradict the Charter. A challenge in maintaining high quality service and client relationships while ensuring that client behaviours are not adversely impacting on individuals and their People First values. Cheryl would be happy to individually connect with anyone that wants to know more about their approach and success to date.

### Discussion:

How was the 12.30-2pm meeting free period rolled out without significant push back?

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The request came from the leaders of the business. It is not mandatory. However it empowers individuals to decline meetings. There has been a reduction in managers putting meetings into others' diaries during that time. Many have blocked the slot out in diaries as a conscious reminder. For client meetings consultants are encouraged to plan meetings further ahead to find meeting times that fit around their rest periods.

Examples of poor practices from clients and how they are challenged?

Main issues they face are around unreasonable response times – they strive to respond within a day but can be chased within minutes/hours – and pressure to be available out of hours – clients seeking to speak to consultants late at night and at weekends.

### Osborne Clarke – Bola Gibson

Bola has been Head of Inclusion and CSR at Osborne Clarke since July 2020. The MBC sits within the Mind and Body strand of their overall Diversity and Inclusion activity.

The firm has a longstanding focus on wellbeing which the senior leadership were keen to build on during the pandemic. Despite the senior support their most recent engagement survey showed that the support offered (flexible working, free gym access etc) wasn't necessarily hitting the mark. People were finding it hard to put suggestions into action. The suggestion that time for wellbeing should be blocked out in diaries was pushed back against. It became clear that giving people autonomy over their wellbeing was the best approach for the firm. This aligned perfectly with the Charter which hadn't yet been fully unleashed.

Towards the end of last year thought was put to how best to use it as a way of addressing wellbeing concerns and challenges. How can the MBC be used as a tool that allows each team to identify what works for them? The firm focussed on Openness and respect - if you can't have the conversation it's difficult to embed the other behaviours.

The MBC was introduced in a firm meeting last year, talking through the principles and encouraging people to go away and think how it might work for them. How do we use the Charter to help you find your route to what will work for you?

It linked with a line manager capability programme - introducing the idea that looking after your people and their wellbeing is a core competency and that line management is a skill that people need to learn. They have now launched a Line Managers MBC toolkit - translating the MBC into a short guide to help managers think about how they can keep it on the agenda, use it to open conversations within their team, identify pinch points within the team and which of the 4 pillars is most relevant. The toolkit contains simple suggestions that managers can work through. It is intended as a thought provoking rather than instructive document. Example suggestions: 'Plan meetings you're responsible for chairing – agree agendas or objectives in advance' and 'Can you have a walking meeting to get away from your screen? Perhaps you could download MS Teams onto your work phone and walk and talk? Initial feedback has been positive. Some had been hesitant about the Charter but being able to pick up the toolkit and start the conversations has helped their teams to open up.

They are looking at the introduction of the MBC to clients. The MBC is among the opportunities that Client Relationship Partners have to think about diversity and inclusion. 'How are you managing

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wellbeing during the pandemic?’ is an easy question to pose in a conversation with clients and a good way to introduce the MBC.

They are looking also at measurement of stress within the firm; looking at ways of measuring that as distinct from overall wellbeing scores.

Discussion: echoing that the line manager piece is particularly important. Mindful delegation in particular is a skill that needs to be learnt and should be embedded in manager capabilities programmes.

### Unilever – Sarah Orchard

Sarah’s experience of managing a team through bereavement, suicide and cancer had highlighted the lack of support available to line managers and put wellbeing high on the agenda. A three week sprint was run to get input from the team on what they would want from a wellbeing charter. They wanted something:

- To be a living and breathing part of their day-to-day (not another Degreed Pathway)
- To have shared accountability and ownership
- To create psychological safety for people to be open and honest without fear that this could impact their career progression.

Sarah proposed the MBC as a framework. It was agreed that it was for everybody to build within their teams how they wanted to operate around the four pillars. Culturally there are sensitivities in every part of the world around how people talk openly about mental health and wellbeing, and they wanted to respect that.

Every market has created an MBC one-pager on which principles they are going to adopt. As they are a global company, a blanket ‘no meetings at lunchtime or after 6pm’ wouldn’t work - but the Charter gives permission to say no, or suggest that input is given by email, or to say ‘what do you need from Legal, can I attend for the first ten minutes?’ Opening up that conversation rather than making it a set of rules. They initiated meeting-free Friday afternoons for 6 months last year.

Unilever have embedded wellbeing within key platforms within Legal. They hold a town hall every month with a wellbeing moment eg an on the sofa chat - honest and open conversations. They have 45 minute Lipton tea breaks (people were missing the facetime connection outside meetings) where people are switched into rooms – you may find someone in your team or it might be someone you never met. As part of learning week they had a session every day about wellbeing – linking it to their products and sharing tangible tips and tricks. They encourage chatter and sharing on Yammer.

Unilever had a wealth of information but not everyone was aware of it (eg many were unaware of the EAP). They have elevated the material that is there, making it part of the every day.

## 5. AOB

The next bi-monthly signatories calls will take place on 17 March at 12pm and 20 May at 11am. Calendar invites will follow.

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