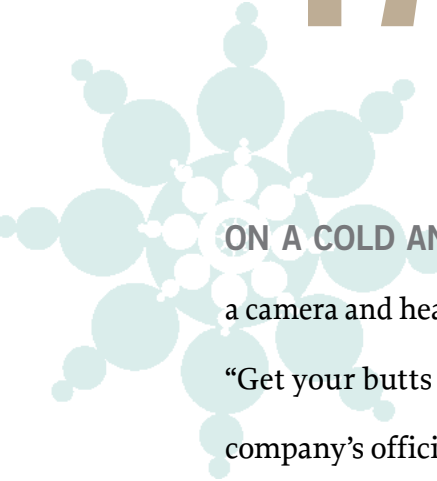


Some firms practise what they preach, treating employees as a valuable resource. Check out their strategies to keep staff stress-free and happy

By Tamar Satov

TAXbreaks



ON A COLD AND BLUSTERY FEBRUARY DAY, ROBERT GOLD GRABS a camera and heads for the park beside his Toronto CA firm with four staff in tow. “Get your butts down in this clear snow right here,” he says, filming the company’s official snow-angel team for a YouTube video challenge to other firms.

“Whoohoo! It’s my first time doing this,” says one of the Bennett Gold employees, laughing. “Terrific! Beautiful!” shouts managing partner Gold, as the four reveal the winged images their bodies left in the snow. “Oh my God. You’re absolutely insane!” someone says of the boss as he lies down on the freezing ground and flaps his arms and legs about. “We love snow days,” says Gold when everyone is done. “All right, let’s get some hot chocolate.”

illustration by KAREN GREENBERG





Investing in wellness will save companies money. Studies show that for every dollar a company spends on wellness, it will save \$3 to \$8 in reduced staff turnover

and absenteeism, greater productivity and even a reduction in its group insurance premiums

No one would blame you for thinking it odd that an accounting firm takes time to play in the snow in the midst of the busy tax season. But it's just one of the ways enlightened employers try to inject some levity, humour, team spirit and stress relief into the typical 60-plus-hour workweek leading up to the tax deadline. "Part of my job is to keep everyone 'up,'" says Gold, recognizing that the overtime the 15-person staff is expected to work — Saturdays from 9 a.m. to 4 p.m. starting in February and up to an additional three evenings a week in March and April — can take its toll.

And while most of us are aware of strategies to reduce stress such as exercising, eating right and taking time to relax, these tasks can seem onerous when you're already pressed for time. That's why firms are doing what they can to make it easier for staff to stave off stress. From mid-season parties to in-house massage to personal valet services — the methods are geared toward preventing health problems and burnout that can result from tax-season stress.

"The right amount of stress gives us energy and makes us more focused, but when there's too much stress for too long, it makes us susceptible to illness," says Beverly Beuermann-King, a stress and wellness expert based in Little Britain, Ont. Indeed, a 2002 US study by accounting professors at Brigham Young and Washington State universities found that the average 63-hour workweek accountants put in between January and April leads to job burnout, which can cause gastrointestinal ills, headaches, high blood pressure, chronic fatigue, depression, anxiety and irritabil-

ity. "Stress can also be a contributing factor in cases of heart attack, stroke and cancer," Beuermann-King says.

In addition to physical symptoms, job burnout has been linked to a negative attitude toward clients, coworkers, the job or the organization. That can be explained, in part, by the surge of adrenaline and other hormones the body releases in its fight-or-flight response to stress, says consultant Karen Denega, a former CA who provides programs on stress management for the Institute of Chartered Accountants of Ontario. "All those hormones going through our bodies can lead to emotional outbursts and poorer decision making, so we might lash out at ourselves or others," she says.

Another reaction to stress is poor sleep, says Denega, and that can affect job satisfaction. According to a 2006 University of Florida study, employees reported higher rates of job satisfaction if they had slept soundly the night before and lower levels if they had experienced insomnia.

Put all these factors together and it's clear why firms that do tax work are getting on the stress-busting bandwagon. It's just good business sense to keep employees from burning out so firms can maintain productivity and retain staff. "Employers realize they should be investing in wellness because it will save them money," says CA Ben Cornell, a human resources consultant at accounting firm Ward & Uptigrove in Listowel, Ont. Studies show that for every dollar a company spends on wellness, it will save between \$3 and \$8 in reduced turnover and absenteeism, greater productivity and even a reduction in group insurance premiums, he says.

"Companies often talk about how their

people are their most important resource, but that doesn't mean anything if it's just a statement on a plaque on the wall," Beuermann-King says. "They actually have to do it."

And many are. Want to know how? Here's a sampling of stress-relieving strategies we found in place at various firms — and the lowdown on why the experts say they are effective.

PROMOTE HEALTHY EATING

Lots of firms have gotten the message and are stocking the office with fresh fruits and vegetables, nuts or other healthy snacks during the busy season. Others also educate their staff on making healthier choices. "At Ward & Uptigrove, we've had a nutritionist come in to review everyone's eating habits and make recommendations to each personally," says Cornell. US firms such as Dworken, Hillman, LaMorte & Sterczala in Shelton, Conn., have gone to greater lengths to keep staff away from energy-sapping foods by having a "biggest loser" contest to see who can lose the most weight over tax season. **Why it works:** Coffee, soft drinks and chocolate might seem like the perfect perk-me-up, but caffeine and refined white sugar only increase the adrenaline rush already stimulated by stress. Denega recalls someone from her stress management workshop who couldn't understand why he was suffering from symptoms of stress when he was doing everything right. "He didn't realize what those eight cups of coffee a day were doing to him," she says.

Bonus tip: Putting healthy food in high-traffic areas of the office and moving junk food vending machines to lower-traffic areas

(like the basement) increase the chance that staff will eat well, Beuermann-King says. "If the chocolate is right there, they'll take that. But if someone has taken care of the work of preparing vegetables and dip or sliced fruit and it is right there — that's what they will choose."

OFFER IN-HOUSE MASSAGE

This is another popular stress-relieving benefit provided by firms at tax time. Bennett Gold, for example, brings in the services of Toronto massage therapy providers In My Hands during tax season to work out staff's tense muscles. At the Toronto office of CA firm Fuller Landau, on-site massage is offered throughout the year, but the frequency increases to once every two weeks from January to March, and weekly in April. "It's 15 minutes that allows you to relax, and it shows that the firm cares about you as an individual," says Laura Couvrette, a senior manager in the firm's assurance group. "That's a powerful message."

Why it works: Massage not only soothes muscles, but also helps with blood circulation, so it can combat afternoon brain fog and get creativity and productivity going again.

Bonus tip: It's a worthwhile expense because it's preventive — it would cost a lot more to pay for a chiropractor later. If the firm's budget is really tight, look into massage schools in the area, says Beuermann-King. "The students need hours of training and may do it for free."

FACILITATE/ENCOURAGE EXERCISE

Regular exercise is often the first to fall by the wayside when files pile up. Finding that 30 minutes or hour for a workout can be tricky, so some firms offer incentives to get people moving.

Natalie Churchill, a manager with Deloitte's global wealth and employer services in Halifax, used the firm's 50% wellness reimbursement to buy a home step machine to make it easier to fit in her morning workout, while many employees at the firm's Vancouver office participate in the *Vancouver Sun* Run 10K each April. Similarly, Couvrette has the support of Fuller Landau's partners to train and compete in the Boston Marathon on April 20 — just 10 days before tax deadline. "The fact that they are encouraging me to

go — that in itself demonstrates the tone from the top," she says.

Over at Ward & Uptigrove, HR consultants Cornell and Carrie Sharpin are both Can-Fit-Pro certified spinning instructors who hold midday classes for the firm's staff at the gym across the street. The firm pays for the use of the spinning bikes and gives staff time off to attend the 45-minute sessions, which are offered up to five times a week. For those who prefer to exercise outside, there's a lunchtime walking group that heads out for a daily 45-minute trek.

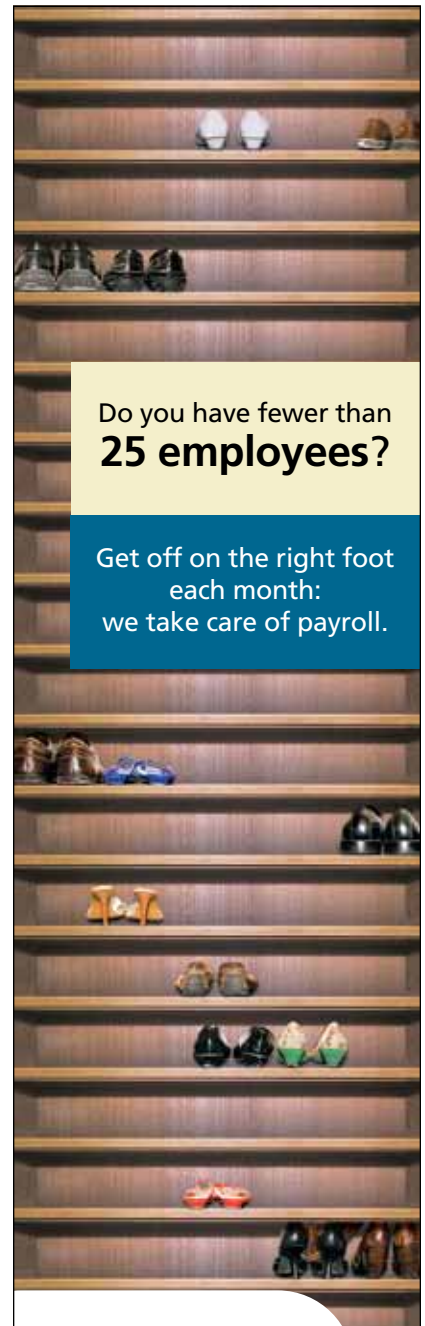
Why it works: When the body is tense and stressed it sends signals to the mind, says Denega. Exercise or stretching releases tension and gets the blood flowing. "You can often feel the difference within 30 seconds of starting," she says. Exercising outside is particularly helpful in winter, because we become susceptible to seasonal affective disorder when there are fewer hours of daylight. "We go to work when it's dark and come home when it's dark — so we have lower levels of melatonin and serotonin, which help with energy and sleep," says Beuermann-King. "Even on a cloudy winter's day, the light outside is many times brighter than indoor lighting."

Bonus tip: Get up from your desk at least once an hour. Take a break and stretch before your muscles get tense, says Beuermann-King. Set a timer if you need a reminder. Try to get outside for 20 minutes twice a day, but if that's impossible, take a break at a large window or in your office's solarium, she adds.

PLAN A MID-SEASON PARTY OR OUTING

While most firms hold a celebration immediately following the tax deadline, some firms give staff a chance to let off steam during the crux of the seasonal crunch. At Bennett Gold, for example, the staff is treated to a National Lacrosse League game at the Air Canada Centre, where pizza, drinks and snacks provided in a corporate box make for a festive atmosphere.

At Fuller Landau, there's a mid-season party in March, such as the mock casino night they held one year or the time they all went out bowling. "It's a chance to get everyone out of the office during that period — when we're all juggling multiple files or we're out of the office doing field reviews — and reconnect with them as people," says Couvrette. Some US firms,



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See the signs

THE EARLIER YOU DEAL WITH STRESS, the less difficult it is to alleviate it. Get to know what your early signs of stress are, and make an action plan of the tactics that work for you. If not, your unaddressed stress could lead to burnout.

10 early signs of STRESS

- Stomach upset
- Craving for sugar
- Loss of appetite
- Insomnia
- Sleeping more
- Grinding teeth
- Making a fist
- Curling your toes
- Negative thoughts
- Pain at pressure point near base of head

Source: *Rena Denega*

10 signs of BURNOUT

- Dread going to work
- Don't have enthusiasm about work that you used to
- Resent coworkers and colleagues
- Feel you'll never get ahead or complete a task
- Changes in sleeping patterns
- Easily bored with work
- Take frequent absences from work
- Catch more colds
- Don't care about quality of your work
- Personal relationships are suffering because of work dissatisfaction

Source: *UNICAP CPA Society*

such as Wilkin & Guttenplan in East Brunswick, NJ, host themed lunches such as beach parties, luaus or sumo wrestling contests.

Why it works: The more you can get staff to connect, the better, says Beuermann-King. That way, they don't feel like they're the only ones slogging through, and they can learn coping strategies from one another. It also gives them an opportunity to get away from work and have a laugh — and laughter initiates the opposite chemical reaction to the body's stress response, says Denega.

Bonus tip: If you can't get out for some fun, try listening to a CD of stand-up comedy for a quick laugh.

DOLE OUT REWARDS

Some firms, such as KPMG's Toronto office, give out movie passes or other vouchers so staff can enjoy an evening out with their significant other. At Fuller Landau, Starbucks and iTunes gift cards are avail-

able to those who go above and beyond. Deloitte's wellness program allows a 50% reimbursement on services such as house-cleaning or dog-walking.

Why it works: Rewards not only recognize hard work and success in projects, making employees feel appreciated, but they also encourage or free up opportunities for stress-reducing leisure time.

Bonus tip: Firms can also use rewards to get people involved in wellness programs, says Beuermann-King. A gift card, for example, may give workers one more incentive to participate in a fitness class or attend a lunch and learn more about nutrition.

LIMIT OVERTIME

This might seem like a no-brainer, but the culture of "the more chargeable hours the better" at tax time is deeply rooted at some firms. But that is slowly changing. At KPMG, for example, managers set reasonable targets for weekly overtime and let employees know that they should not

exceed that amount. If they notice one person has more chargeable time than others, they'll redistribute work and suggest that person work fewer hours. "We do request that everyone take off at least one day on the weekend," says Jim Yager, national leader for KPMG's international executive services practice. "This allows our staff to still have a life outside of work, when people can schedule personal matters."

At Fuller Landau, staff is limited to a 50-hour week from mid-January until the end of March and a 45-hour week in April — and employees can put the time in when it best suits them. "The overall culture is really about respecting the individual," says Couvrette. "You're not a workhorse."

Why it works: To stay healthy, a person must get seven to nine hours of sleep a night and also feel as though he or she has a life outside of work, says Beuermann-King. When firms show an understanding that it's not realistic for their people to work all the

time, employees will log fewer sick days, be more productive and are less likely to leave the firm for another job or go out on their own.

Bonus tip: Retirees could be a sensible solution for heavy seasonal workloads. It might suit them to work just a few months a year and have the summers off.

HIRE A PERSONAL VALET

At least one US firm has taken the idea of freeing up employees' time even further by hiring a full-time personal valet. At Barfield Murphy Shank & Smith in Birmingham, Ala., Betsy Nolen takes care of the individual needs of the firm's 100-plus staff. That includes banking, purchasing and wrapping gifts, waiting for home deliveries or service people, returning ill-fitting or unwanted retail purchases, picking up prescriptions, taking cars in for servicing or cleaning and even making a milk run for organic dairy products from a farm about an hour's drive from the office.

Why it works: "Knowing that I don't have to worry about getting these things done reduces my stress level and gives me time to spend at home with my family," says CPA Jaime Norris, a senior audit manager who has been at the firm for the past seven years. It also creates a culture of support where the firm is taking care of its employees, says Denega.

Bonus tip: The firm has streamlined the process by using an online system to log valet requests, and personal expenses that are paid for by the firm are deducted from the employee's next paycheck.

BE FLEXIBLE

Flexible schedules and working from home are becoming more common as technology allows for the virtual office. "It's not like you have to be in the office all the time — you can leave at 5 p.m., go home, have dinner and then start working again," says Janice Wells, a senior manager at Deloitte in Vancouver, adding that her group is paperless, so staff doesn't have to cart files back and forth.

Couvrette says the flexibility she has at Fuller Landau is one of the things that keeps her from leaving the industry. She recalls an incident in a previous job early in her career where she had to go to a client's site on a Saturday even though she had finished all her work and her father

was in town for a visit. "We still had time together, but not as much," she says. It led her to harbour negative feelings toward the employer and, eventually, leave.

Why it works: Time off in lieu or flex time works really well to alleviate work pressure because it gives individuals more control over their situations, says Denega. The ability to work at home is also a big time-saver, as the average Canadian commutes 63 minutes to and from work, says Beuermann-King. "Companies should be focusing more on the completion of projects and less on face time."

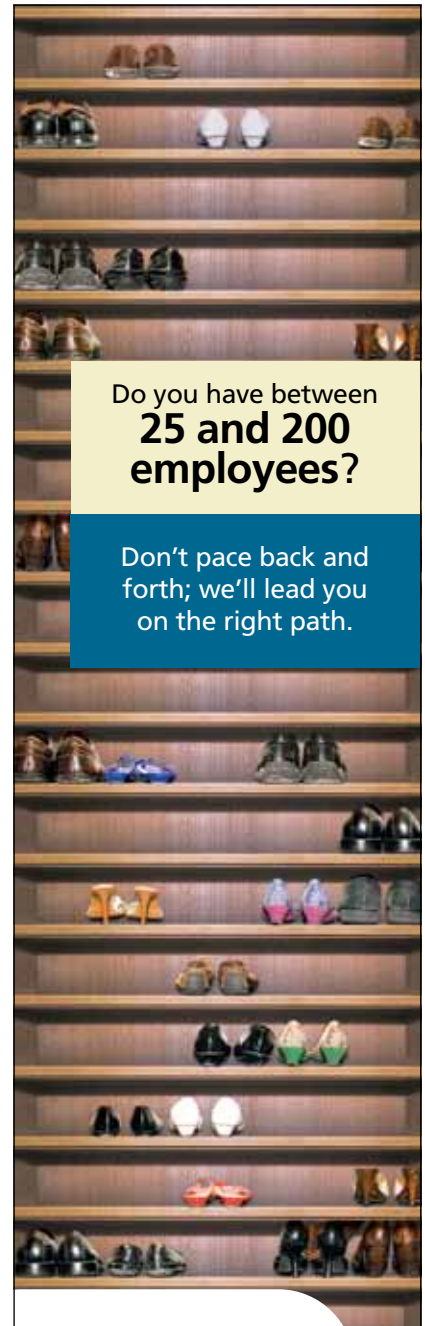
Bonus tip: Still want everyone to come in on weekends? Take a page out of Barfield Murphy Shank & Smith's ledger book — when staff is called in for a few hours on a Saturday, the firm sets up videos and games in one of the meeting rooms and arranges babysitting.

Regardless of what strategies firms employ to get their staff on the road to wellness, there are a few musts, say the experts. First, management has to set the example. "Your supervisor might say you need to take breaks and eat healthily, but if he or she is working through lunch, calling lunch meetings or stomping around the office screaming and yelling — that doesn't set the tone," says Beuermann-King.

Second, give staff a say. "We feel stress when we feel that we can't control things," says Denega, who suggests getting a small group of employees together to discuss what they think the hardest thing is about tax time and have them come up with strategies and solutions. It's also important to have someone responsible for monitoring the firm's initiatives to see what worked well or not, so you don't make the same mistakes year after year. This can be done through employee surveys, exit interviews or by an assessment of any changes in the firm's statistics on productivity, absenteeism, medical or disability claims and turnover.

Finally, don't underestimate the value of a thank-you. "People simply aren't being told they are doing a good job," says Beuermann-King. "Praise and thanks are so important to feeling appreciated — and it doesn't have to be monetary."

Tamar Satov is a senior editor with *CAMagazine*



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