

## 2023 Pool Banker RoundTable Notes

### Training

- a) What VBA training to-date has been the most helpful to you?  
HR administrator training, 401(k) conference, Connect(Protect), Leadership Conference
- b) What additional trainings would be helpful to you and your HR team?  
HR Compliance, legal impacts to ChatGPT/AI

### Well-being

- a) Do you have a well-being strategy in place today? If so, please elaborate.  
No formal strategies but would like VBA assistance. Walk-by with staff weekly to check-in.
- b) What are you considering in the future for your well-being strategy?  
Like idea of incorporating lifestyle spending accounts. Conducted employee survey and identified paid leave, EAP and student assistance as key employee needs.

### Communication

- a) What type of communication have you found resonates the most with employees (spouses)?  
Virtual employee meetings (open to all topics). Take advantage of all communication forums.
- b) What are some benefit topics that would be helpful to educate your participants?  
Open enrollment resources, HSA education, financial wellness
- c) Have you found our quarterly well-being campaigns (mental health, cancer and metabolic conditions) helpful?  
Appreciate materials already prepared (it makes HR look good). Hope VBA continues to create content.

### Self-care

- a) How are you encouraging your team to take care of themselves?  
Introduced kickball tourney for staff, step challenges, lunchtime walks, journaling, hybrid schedules