

## To Be or Not to Be - A Suicide Solution?<sup>1</sup> A Case in Point

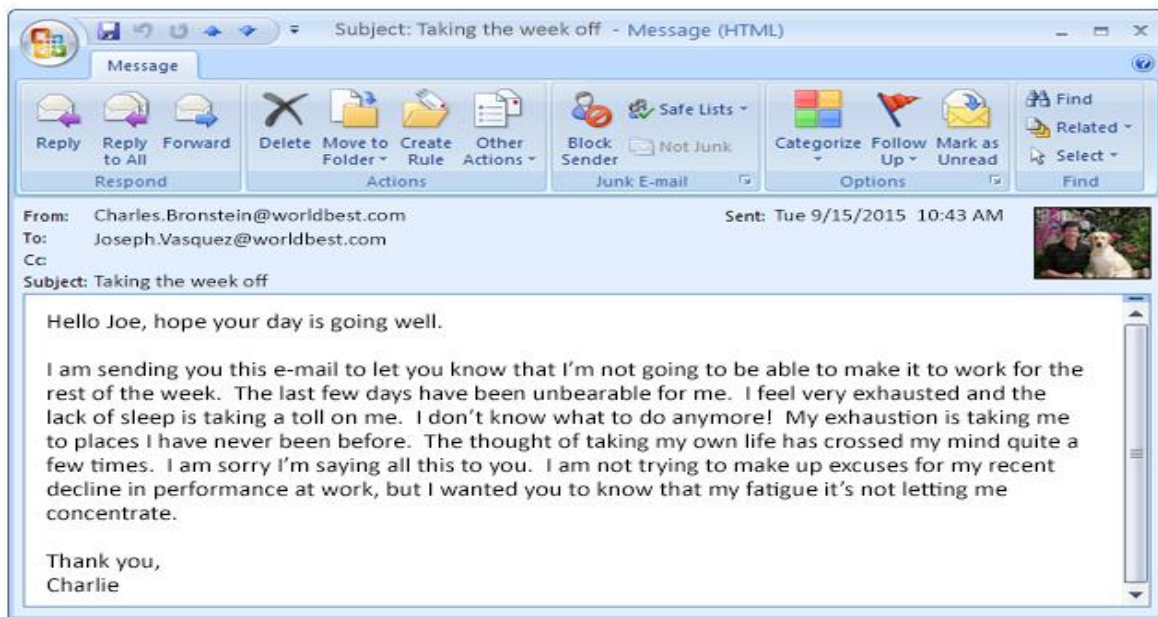
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### Abstract

*This case depicts the issues managers and Companies face when dealing with a suicidal employee. In this case, Joseph Vasquez, a local Operations Manager for the Presentations team of WorldBest Investment Bank (a pseudonym) receives an e-mail from one of his San Francisco based employees, Charles Bronstein, in which he reveals that he has been dealing with a severe case of insomnia during the past few weeks. The situation is so extreme that he has contemplated suicide. Joseph has to act fast making sure he does everything in his power to mitigate this situation and hopefully achieve a happy conclusion to this issue. The goal is to show the perspectives of both the manager and Human Resources for a company when dealing with issues pertaining to suicide. A teaching note follows which provides a case summary, a manager's and HR's perspective of the situation as well as lessons learned.*

**Keywords:** To Be or Not to Be, A Suicide Solution

### To Be or Not to Be - A Suicide Solution? A Case in Point



Charlie Bronstein was a mild-mannered and very quiet employee. As of September of 2015, he had been working for WorldBest Investment Bank (“WBIB”) for approximately 10 years as a Presentations Specialist. WorldBest Investment Bank, founded in 1910, is a global leader in financial services, offers solutions to the world's most important corporations, governments, and institutions in more than 100 countries. It also employs about 200 thousand people. Charlie's role consisted of editing PowerPoint and Word Presentations for the Investment Bankers. He worked out of the San Francisco office during his entire tenure with the company. The Presentations department for WBIB consisted of a global team with locations all over the world. San Francisco was a local hub for the North America team. All the locations for the Presentations department worked collectively to get all the global work done. The San Francisco team consisted of three employees and their manager, Carol Carrillo, who left the company in March of 2015.

<sup>1</sup> Note: The names in this case have been changed to protect the identities of those involved, as well as the institution for which they work. All information was collected from personal experience and conversations that happened between the parties involved.

Charlie's quality was impeccable. However, when it came to the amount of time it took him to get his work done, it was unacceptable and created a lot of friction with the rest of the global team. Carol did a great job shielding Charlie from all the criticism and always had an excuse to justify Charlie's low timeliness scores. At the time of her departure, Carol's manager had pressured her to put Charlie on a Performance Improvement Plan (PIP), which was centered on his timeliness. When she left the company, the decision was made to not hire another manager in San Francisco. Instead, Charlie and the rest of the San Francisco team were re-aligned to Joseph "Joe" Vasquez. Joe was a manager located in New York. He quickly took the needed steps to make sure Charlie completed the PIP that was assigned to him by Carol. He met with him weekly to make sure he was meeting the milestones discussed in the plan. Charlie was excelling and making good progress and at the end of the three month period, Joe recommended that the PIP to be closed. Through the many conversations they had, Joe became more aware of some of the issues that Charlie was dealing with. A lot of it were kept confidential by Carol because of the sensitivity of the matter. To start, Charlie had hearing impairment issues. This was a serious problem as he could not hear properly what others were communicating to him. Charlie was too embarrassed to tell anyone he spoke to on the phone from the global team that he wore hearing aids. He specifically had issues understanding people with different accents. Charlie also needed the right ergonomic setup for his desk in order to improve his chronic back pain. Joe took it upon himself to make sure Charlie had everything needed in order to increase his job performance. He contacted disability services at the bank and made sure Charlie had a captioned telephone or CapTel as they are commonly called. CapTel phones are ideal for people with some degree of hearing loss in that they work like any other telephone with one important addition, the phone displays every word the caller says throughout the conversation.<sup>2</sup> Joe also made sure that Charlie had the proper ergonomic equipment needed, such as sit and standing desk, and the right chair.

Occasionally, Joe kept receiving complaints about Charlie from the global team, but he could not tell them the issues Charlie was dealing with as they were mostly kept confidential. He dealt with those comments the best way he could and worked out better ways for Charlie to deal with the global team. Overall, Charlie's performance kept improving and the complaints were becoming less and less.

Towards mid-August 2015, Joe started noticing that Charlie was calling out more frequently than usual. He did not make a big deal out of it since Charlie still had enough sick and personal time left for the year. Joe also started getting concerned when Charlie's quality scores started to show some decline during the same period of time. Charlie never had issues with his quality until now. It was difficult for Joe to notice any physical or attitudinal changes with Charlie because they were at different physical locations. On Monday, September 14<sup>th</sup>, 2015, Charlie called Joe and told him he was not feeling well and was going to take the day off. Joe noticed something different with Charlie's voice, but did not want to ask too many questions as he did not want to be too invasive of Charlie's privacy. The following day, Charlie followed up with an e-mail telling Joe he was taking the entire week off. In the same e-mail, Charlie opened up to Joe and told him that he was having a very difficult time sleeping and that his level of exhaustion was such that he had contemplated taking his own life. When Joe read that, he knew he had to act right away.

Joe had been a manager for several years. He had dealt with many difficult situations, but none of those situations got him ready for what was brewing with Charlie. Without much experience dealing with someone that was suicidal, his first reaction was to reach out to his direct manager, Julia Williams. Julia, knowing how delicate the situation was, he decided to reach out to the Global Head of the department and get her input on the matter. After discussing the situation, Julia told Joe to reach out to Human Resources.

WBIB prides itself in having a great team of professionals ready to deal with all kinds of situations. After all, they say that their employees are their greatest asset. The call to Human Resources set a series of events in motion. First, the Human Resources representative put Joe in contact with the Employee Relations Department. In order for Employee Relations to be able to act on the matter, Charlie would have to be ok with someone contacting him. Here is where Joe would have put his communication skills at work. He needed to be

<sup>2</sup> Source: Ultratec. Retrieved from <https://www.ultratec.com/products/captel/>, 5/12/2022

able to convince Charlie to have a conversation with someone else without giving up the fact that he already started the process with HR and Employee Relations. This was a very important conversation. The outcome could go both ways, so it was imperative that the message be delivered well and clearly.

Joe reached out to Charlie and expressed his concern with the situation he was going through. Joe nailed the delivery and Charlie felt the sincerity coming from his manager. After all, Joe really cared for what Charlie was going through and wanted to make a positive impact. This conversation went so well that it opened up the doors for Charlie to receive additional help from WBIB. As his manager, Joe was advised not to try to get a lot of information from Charlie about any health conditions. If Charlie wanted to share, then it was ok for him to listen. Confidentiality is a big concern, and the last thing the company wanted was for someone else to find out about any underlying health issues that Charlie might have had and then be served with a lawsuit for invasion of privacy. Charlie ultimately agreed to talk to someone from Employee Relations. Once the link was made between Charlie and Employee Relations, there was very little information shared with Joe due to the confidentiality of the matter.

Ultimately, Charlie was approved to go on Disability/FMLA leave to deal with his mental medical problem. This lasted a few months. After these benefits ran out, he was approved to go on short-term disability and then long-term disability. In total, Charlie was out for almost 10 months, far exceeding his employment protection. In order to retain his position, Charlie ended up coming back and worked out special arrangements with Employee Relations and Joe in order for him to continue getting the treatment needed.

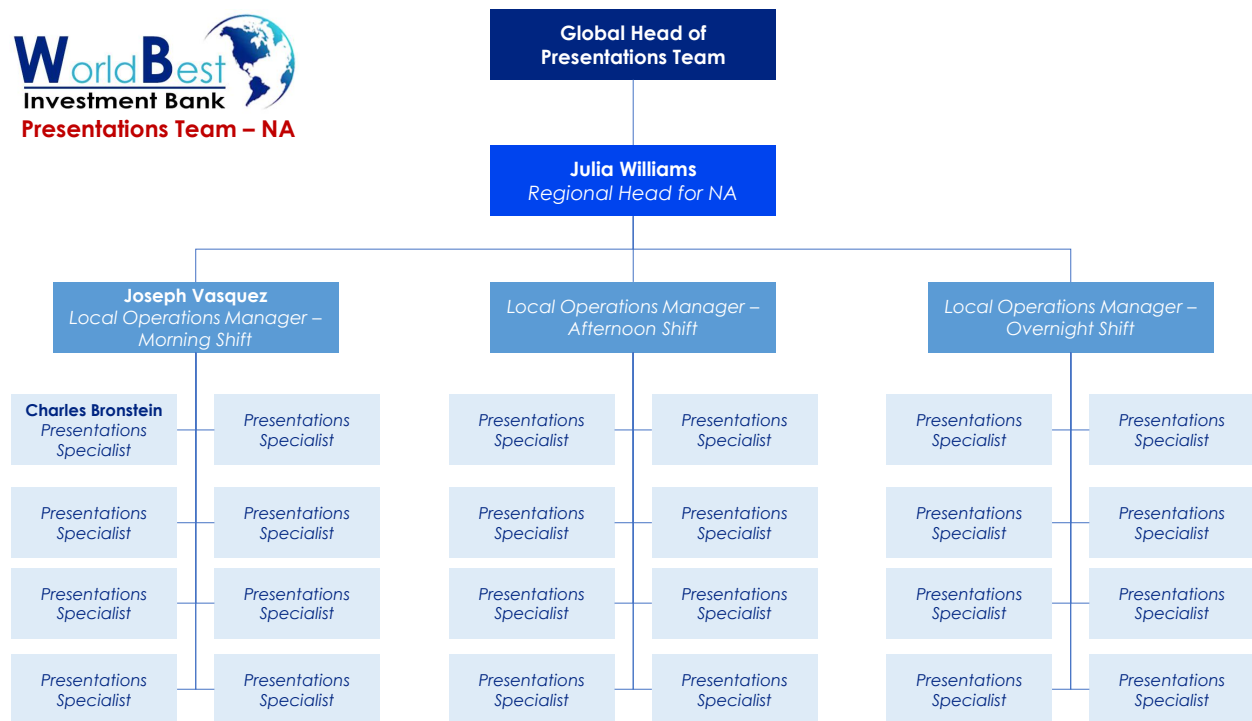
During the time Charlie was out, he would reach out to Joe every so often to keep him updated on his situation. He told Joe that WBIB had set him up with therapy sessions which were very helpful. After visiting a few different doctors with no luck, he finally was able to get a diagnosis for his situation. It turns out, he had a tumor in his brain that was causing a lot of issues. Luckily, he was able to get help and he credited the support he received from WBIB with kickstarting this process.

Afraid of losing his position with the department, Charlie went back to work on a modified schedule while still getting the treatments he needed for the next few months. While it is hard to tell if his death wishes went away completely, he has not exhibited any more related issues. Judging from his improved quality and timeliness metrics, he seemed to have shown progress. However, there is always a lingering concern for the Management team about Charlie's mental health state. Will he have suicidal tendencies in the future? Only time would tell. Enough time went by without any issues. However, a few weeks later, Charlie sent Joe another e-mail telling him that he was not feeling well and needed to take the week off.

Appendix A: WorldBest Corporate Structure



**Appendix B: WorldBest Investment Bank: Presentations Team – NA Structure**



**Appendix C: WorldBest Investment Bank: Who we are?**

**WorldBest Investment Bank**  
Who We Are

People and Culture

About Us | News & Stories | Impact | Institute | Investors | Careers

## WHO WE ARE

### Our Culture

We believe that diversity among our employees enables us to be the world-class company we are today. We strive to foster a culture of respect, and are committed to making our workforce, workplace and marketplace diverse, inclusive and accessible for all our employees.

### A Workplace for Everyone

A talent-driven company is by definition a diverse and inclusive one. Though we aim to do better still, we're proud of the workplace we've created.

- 10k+** veterans hired since 2011
- 49%** of new global hires are women
- 58%** of new US hires are ethnically diverse
- 300MM** invested in employee training each year

[Supporting Our People](#)

We're proud of the culture we've created. And we're continually investing in new ways to develop all of our people to enable them to grow and succeed throughout their careers.

[Learn more](#)

[Explore Diversity And Inclusion](#)

### Our Talent, Supporting our Communities

Together, we work hard to strengthen our firm's diverse and inclusive culture, and partner with diverse suppliers. We're proud of the industry recognition received that recognizes the firm's efforts and represents our diverse, global talent.

- A Best Place to Work for Disability Inclusion**  
"There's no question that inclusion drives better business results," says Office of Disability Inclusion Head as the firm once again scores 100 on the Disability Equality Index.  
*Disability Equality Index (DEI)*
- Perfect score on Corporate Equality Index**  
The firm earned 100% for the 17th consecutive year since inception of the Human Rights Campaign's measure for LGBTQ-inclusive workplace policies and practices.  
*hrc.org*
- Firm recognized by Latina Style 50**  
The firm was named as #2 on the list of the Top 50 Best Companies for Latinas to Work for in the U.S.  
*LATINA Style Inc.*

**Explore your future with us**  
If you want to make an impact with your work while being supported by smart and motivated colleagues, come find your next opportunity with us.

Source: WorldBest company website

## To Be or Not to Be - A Suicide Solution?<sup>3</sup> A Case in Point: Teaching Note

### Introduction

As of 2017, the American Foundation for Suicide Prevention states that Suicide is the 10<sup>th</sup> leading cause of death in the United States. In the same year, 47,173 Americans died by suicide, and roughly 1.4 million tried to end their own lives. What is suicide? Suicide is the act of taking your own life. In many cases, is the result of depression or other mental illness (APA, 2020). According to Weir (2019), the suicide rate continues to climb. From 1999 through 2017, there has been an astonishing increase of 33 percent. This increase has been more noticeable since 2006, and it represents the fourth leading cause of death for people ages 35 to 54 and the second for 10 to 34-year-olds. Suicide and suicide attempts have profound consequences for the families, friends, and coworkers of those who died, as well as those who survived. It also comes with a hefty price tag. According to a study by Shepard, Gurewich, Lwin, Reed and Silverman (2015), the average cost of one suicide was approximately \$1.3 million dollars. More than 97% of the total cost was due to loss of productivity and the remaining 3 percent were costs related to medical treatments. The overall cost of suicides and suicide attempts in the U.S. was \$93.5bn for 2015.

Looking at such results generated by suicides and suicide attempts, it is not uncommon to see big companies invest resources in making sure they are handling situations of this nature. Managers and Human Resource departments have an important role to play when it comes to such cases. This case study narrates a suicide prevention story by an employee of WorldBest Investment Bank named Charlie Bronstein. Charlie sent an e-mail to his manager, Joseph “Joe” Vasquez in which he mentioned how he was contemplating suicide. Joseph had to act quickly to make sure he did everything in his power to mitigate this situation and achieve a positive conclusion to this matter. The goal for this analysis, is to show the perspectives of both the manager and Human Resources for a company when dealing with issues pertaining to suicide.

### Case Summary

This case is about Charlie Bronstein, a Presentations Specialist who had been an employee of WorldBest Investment Bank for almost 10 years. He worked out of the San Francisco hub of the North America Presentations department, together with two more employees and a manager, Carol, who left the firm a few months ago. Charlie’s work quality was flawless; however, his timeliness was horrible. This caused tension with the rest of the global Presentations team and prompted Carol to place him on a Personal Improvement Plan (“PIP”) right before she left the firm. When Carol left, Charlie began reporting to another manager, Joseph “Joe” Vasquez. Under Joe, Charlie began to excel. He completed the PIP and started doing better all-around in the following months. Through the many conversations Joe had with Charlie, he came to find out many confidential issues that were mostly known to Carol and HR. Such as the hearing impairment issues, and chronic back pain Charlie had. Joe made sure he supported Charlie as much as possible and got him the necessary equipment and ergonomic setup needed for him to perform his work better. The company, after all, was very good at making sure employees with disabilities had what they needed to perform their work. The hearing issue was particularly embarrassing for Charlie, and he never told anyone outside of the San Francisco team about it. His issues understanding others, caused that a lot of friction with the members of the global Presentations team. Joe kept all the personal issues confidential and dealt with the complaints he received from the other team members very professionally.

Towards mid-August of 2015, Joe started noticing that Charlie was taking a lot of days off. He did not make a big deal out of it because Charlie had plenty of personal time available to use for the year. What caught Joe’s attention was the fact that Charlie’s performance metrics were declining. On September 15<sup>th</sup>, 2015, Charlie sent an e-mail to Joe revealing that he had been dealing with a severe case of insomnia during the past

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<sup>3</sup> Note: The names in this case have been changed to protect the identities of those involved, as well as the institution for which they work. All information was collected from personal experience and conversations that happened between the parties involved.

few weeks and that the situation was so extreme that he has contemplated suicide. Joe, who had never been confronted with a similar situation, reached out for guidance from his manager. Ultimately, they got the company's Human Resource and Employee Relations departments involved. Upon finding out what the cause of the insomnia was, Charlie was able to get the help needed from counseling provided by the company, as well as treatments from by his doctors. Towards the end of the case study, we can see that Charlie made significant progress, but the Management team always worries about a possible relapse. The case ends with another e-mail sent by Charlie to Joe, in which he states that he needs to take some time off because he was not feeling well.

### **The Manager's perspective: What to do when someone is suicidal?**

With the increase in suicides and suicide attempts happening in the U.S., it is more likely that managers, at some point, will be faced with dealing with a similar situation. Managers are in the front lines, and sometimes employees can make passive or specific statements (or threats) when it comes to suicide. According to Christine M. (2016), for those threats that are more specific in nature, where for example if someone says they plan on driving their car off the road on their way home, the best way is to call 911 right away and have the police or ambulance come to the workplace to further assess and possibly transport the employee to the local emergency room or mental health hospital. With these types of threats, we should not be too concerned with the "what ifs" that will be generated with calling 911. Some managers will be afraid of what the other employees will think, how will they react? What if the employee was not being serious when he made the statement? What managers should be thinking is: What if the employee really meant it? Any time a threat is made, the assumption from the manager must be that he or she is serious and acted on as such. An employee's safety (and possibly the safety of others) must take priority (M, Christine, 2016). Another possible solution would be to call someone at the employees' home (husband or wife for example) and have them come and pick up the employee and agree to take them to their doctor for further evaluation.

For those threats that are more passive, the situation could be more difficult to handle. According to Christine M. (2016), in situations like those, the manager's job is to engage the employee and try to get more information. Managers should not be worried of asking questions that would potentially plant the thought of suicide in the employee's head. "If someone is not already having thoughts about self-harm, asking the question is not going to plant that seed" (M, Christine, 2016). Managers have to understand that they are not in the position to "diagnose" the problems employees are having. Instead, they should take the opportunity to refer them to the proper channels available through their companies. Such as the different Employee Assistance Programs (EAP), Employee Relations and/or Human Resources. Managers need to understand that they are not alone and that there are programs available to help them deal with the situation. They also need to understand that acting quickly in gathering the information needed, can help determine the appropriate next steps (Cigna, 2019).

### **The HR's perspective: How can HR help?**

HR plays an important role when it comes to making sure there are systems in place to help employees that are suicidal. The first thing that HR leaders can do to help, is to train managers and/or co-workers to look for specific signs of personal struggle (Starner, 2018). According to Starner (2016), to accomplish this, HR should introduce educational training from available Suicide programs which educate designated staff members on signs and signals of potential self-harm, and guides those staff through how to speak and ask about suicide in a frank and open manner. Starner (2016) also highlights the importance of HR departments to adding Employee Assistance Programs (EAP) to the list of benefits provided by the company. Employers should look for standalone, best-practice EAPs, with no ties to insurance companies, that can create meaningful utilization and outcomes for all staff, including those in crisis or who may be suicidal. Many companies, such as WBIB, have another department called Employee Relations. The goal of Employee Relations is to maintain a positive and constructive relationship between the company and the employees. This department is usually managed by the HR team of an organization and occasionally they have dedicated employees managing this function. Some typical responsibilities of an employee relations manager are to act as a liaison between employees and



managers, and advising on manners such as fair compensation, benefits, work-life balance and working hours. When it comes to employee relations, an HR department has two primary functions. First, HR helps prevent and resolve problems or disputes between employees and management. Second, they assist in creating and enforcing policies that are fair and consistent for everyone in the workplace (bambooHR, 2020).

Some other ways that HR can be effective assisting on suicide prevention is by making sure managers are aware of the FMLA laws, short-term and long-term disability benefits. In the event the employees needs to take time off, managers should know exactly how it works (is good for managers to know regardless, as there are other reasons, other than those related to suicide, for employees to use these benefits). FMLA is a leave that must be provided by the employer to eligible employees when they or their immediate family members are faced with various medical issues. The leave is unpaid, but the employer must maintain health coverage for the employee while they are on leave (Robert Lussier and John Hendon, Chapter 13. 2019). Short-term disability is insurance against being unable to perform the essential functions expected of the employee at work for up to 6 months due to illness or injury—not necessarily a work-related illness or injury (Robert Lussier and John Hendon, Chapter 13. 2019). Long-term disability policies cover employees who are unable to work for more than 6 months due to illness or injury—again, not necessarily a work-related illness or injury. Long term disability is designed to replace a portion of the disabled employee's income (typically 50%–60%) for extended periods of time, or even permanently (Robert Lussier and John Hendon, Chapter 13. 2019). For this case study, the employee was located in San Francisco and the manager in New York. It is important for the managers to have a basic understanding of labor laws and regulations for where their employees are located.

### **Lessons to learn**

For this case study, we can see how Joe followed a lot of the protocols suggested when dealing with a suicidal employee. However, the fact that he did not know how to address a situation of that magnitude, tells us that WBIB needs to provide additional training for their managers to deal with such situations. He did the right thing by escalating the situation to his manager, but he did not know what to do right at the moment he received the e-mail. From the HR perspective, they followed-up quickly and were able to handle the situation correctly. One of the things they should improve on is creating a pathway for employees to return to work. As you can see, Charlie returned to the office without finishing his treatment and mainly because he was afraid that his employment protection ran out. Ultimately, WBIB did the right thing by allowing Charlie to work out a schedule with his manager to continue his treatment. Another lesson to learn is that better systems should be implemented when managing a person remotely. The fact that Charlie and Joe were located in different parts of the country, makes it difficult for Joe to physically notice changes with Charlie. Remote managing is an area of improvement for most companies. For example, considering what we are going through at the moment with the COVID-19 pandemic, and the fact that everyone is mostly working remotely, companies and HR departments need to implement the right training for managers to pay attention to the well-being of their staff. Lastly, there has to be a better support system implemented for those employees that return to work after going through a situation similar to Charlie's. Although he was doing better, there is no way to tell if he is going to attempt to do something similar in the future. From the way the case ended, we can assume that they were in for another episode. Managers and employees need additional training and support to cope with the aftermath of these types of situation.

### **Conclusion**

Suicide and suicide attempts are on the rise. Companies should continue to invest in developing the proper training programs for their managers as well as creating the right support systems for employees that have been affected. It is a collective effort that should involved not just HR and managers, but also the employees of the firm. Suicide awareness training should be made available to all employees of the company. It is very important for everyone to understand the warning signs of suicide. For this case study, Charlie was able to get, at least temporarily, the help he needed. There has to be a better support system implemented for those involved in similar situations. For managers, this could be a very traumatic experience if they have an employee that

succeeds on their suicide attempt. For those employees that were feeling suicidal, they need the right support to prevent future relapses. Fortunately for Charlie, he worked for a company that provided some of the help he needed to weather the storm, at least for the time being.

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