



SHRM SURVEY FINDINGS: 2015 STRATEGIC BENEFITS— WELLNESS INITIATIVES

CHATRANE BIRBAL
SENIOR ADVISOR, GOVERNMENT RELATIONS

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Introduction

THE 2015 STRATEGIC BENEFITS SURVEY IS PART OF A SURVEY SERIES ADMINISTERED ANNUALLY SINCE 2012 BY THE SOCIETY FOR HUMAN RESOURCE MANAGEMENT (SHRM). THIS RESEARCH IS USED TO DETERMINE WHETHER VARIOUS EMPLOYEE BENEFITS ARE LEVERAGED TO RECRUIT AND RETAIN TOP TALENT. THE SIX-PART SERIES FEATURES THE FOLLOWING TOPICS:

- PART 1: WELLNESS INITIATIVES
- PART 2: FLEXIBLE WORK ARRANGEMENTS
- PART 3: HEALTH CARE
- PART 4: LEVERAGING BENEFITS TO RETAIN EMPLOYEES
- PART 5: LEVERAGING BENEFITS TO RECRUIT EMPLOYEES
- PART 6: ASSESSMENT AND COMMUNICATION OF BENEFITS

Definitions

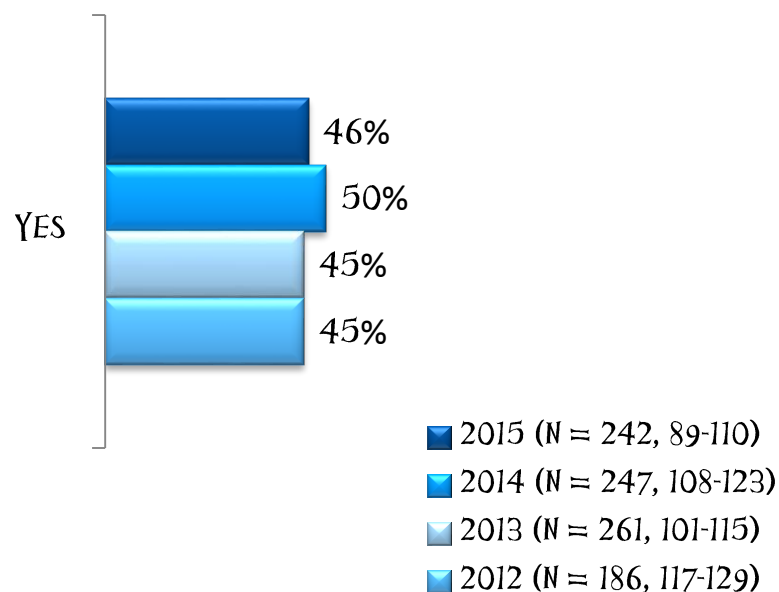
FOR THE PURPOSE OF THIS SURVEY, *WELLNESS INITIATIVES* ARE ANY TYPE OF WELLNESS PROGRAM, RESOURCE OR SERVICE OFFERED TO EMPLOYEES. *FINANCIAL EDUCATION INITIATIVES* ARE DEFINED AS ANY WORKPLACE INITIATIVE, PROGRAM OR RESOURCE DESIGNED TO PROVIDE EMPLOYEES WITH INFORMATION ON HOW TO EFFECTIVELY MANAGE THEIR FINANCIAL RESOURCES FOR A LIFETIME OF FINANCIAL WELL-BEING.

- Wellness initiatives and use: ABOUT TWO-THIRDS (69% OF HR PROFESSIONALS INDICATED THEIR ORGANIZATIONS OFFERED SOME TYPE OF WELLNESS PROGRAM, RESOURCE OR SERVICE TO THEIR EMPLOYEES.
- Return on investment (ROI) and cost-savings from wellness initiatives: IN 2014, 72% OF ORGANIZATIONS THAT OFFERED SOME TYPE OF WELLNESS PROGRAM, RESOURCE OR SERVICE DID NOT CONDUCT AN ANALYSIS TO DETERMINE THEIR ROI AND/OR COST-SAVINGS FOR THEIR WELLNESS INITIATIVES; 16% CONDUCTED BOTH AN ROI AND COST-SAVINGS ANALYSIS, 7% CONDUCTED A COST-SAVINGS ANALYSIS, AND 4% CONDUCTED AN ANALYSIS TO DETERMINE THEIR ROI.
- Change in employee participation in wellness initiatives: ABOUT ONE-HALF (52% OF RESPONDENTS FROM ORGANIZATIONS THAT OFFERED SOME TYPE OF WELLNESS PROGRAM, RESOURCE OR SERVICE INDICATED EMPLOYEE PARTICIPATION INCREASED LAST YEAR COMPARED WITH THE YEAR BEFORE.

KEY FINDINGS (CONTINUED)

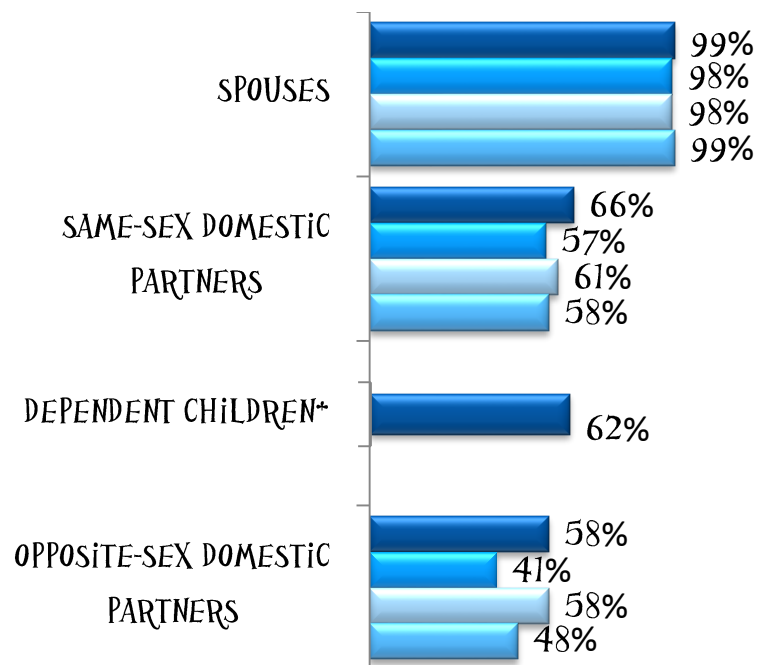
- Effectiveness of wellness initiatives in reducing health care costs and improving the overall health of employees: **MORE THAN THREE-QUARTERS OF RESPONDENTS FROM ORGANIZATIONS THAT HAD WELLNESS INITIATIVES IN PLACE INDICATED THESE INITIATIVES WERE “SOMEWHAT” OR “VERY EFFECTIVE” IN REDUCING THE COSTS OF HEALTH CARE (77%)**
- Wellness incentives or rewards: **ABOUT THREE-FIFTHS (59% OF ORGANIZATIONS THAT HAD WELLNESS INITIATIVES IN PLACE OFFERED WELLNESS INCENTIVES OR REWARDS.**
- Wellness initiatives extended to dependents: **JUST UNDER ONE-HALF (46% OF ORGANIZATIONS THAT HAD WELLNESS INITIATIVES IN PLACE EXTENDED THEM TO EMPLOYEE DEPENDENTS.**

ARE ANY OF YOUR ORGANIZATION'S WELLNESS INITIATIVES
EXTENDED TO DEPENDENTS?



NOTE: RESPONDENTS WHOSE ORGANIZATIONS HAD WELLNESS INITIATIVES IN PLACE WERE ASKED THIS QUESTION. RESPONSE OPTIONS PROVIDED WERE "YES/NO/NOT SURE." RESPONDENTS WHO INDICATED THEY WERE "NOT SURE" WERE EXCLUDED FROM THIS ANALYSIS. ONLY "YES" RESPONSES ARE SHOWN.

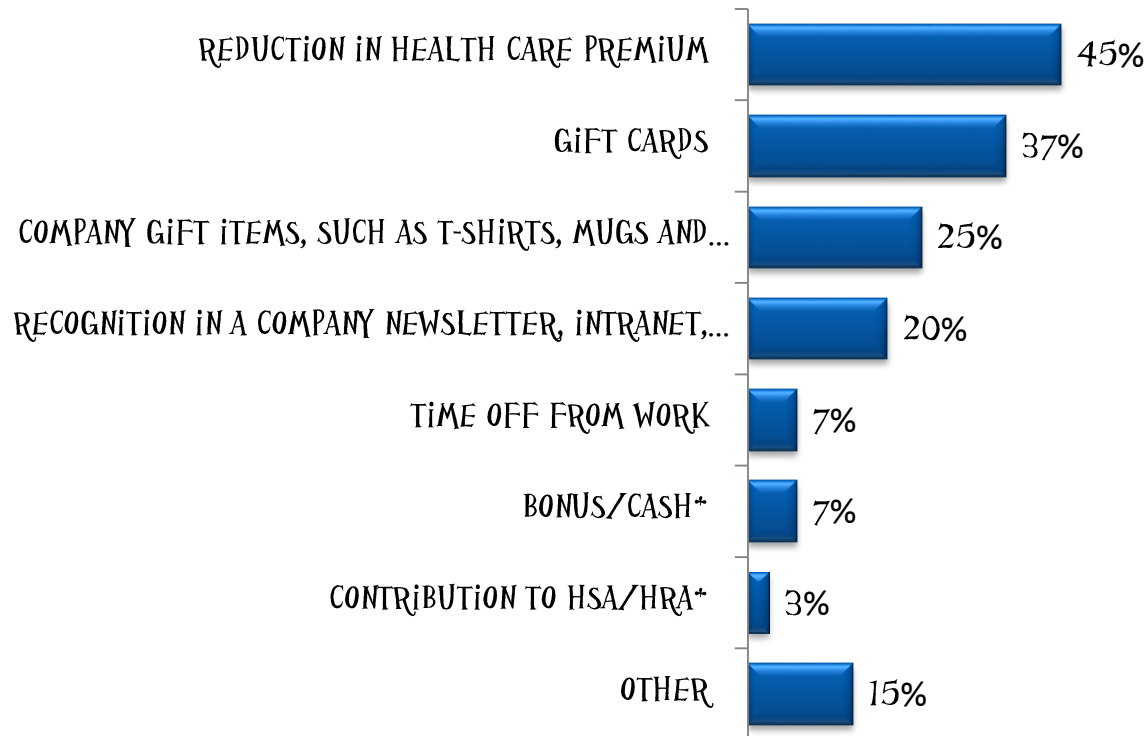
WHICH EMPLOYEE DEPENDENT GROUPS ARE YOUR ORGANIZATION'S
WELLNESS INITIATIVES EXTENDED TO?



NOTE: RESPONDENTS WHOSE ORGANIZATIONS EXTENDED WELLNESS INITIATIVES TO EMPLOYEE DEPENDENTS WERE ASKED THIS QUESTION. RESPONDENTS WHO INDICATED THEY WERE "NOT SURE" WERE EXCLUDED FROM THIS ANALYSIS. PERCENTAGES DO NOT TOTAL 100% DUE TO MULTIPLE RESPONSE OPTIONS. *INCLUDES FOSTER CHILDREN AND DEPENDENT GRANDCHILDREN; GROUPS COLLAPSED INTO ONE ITEM ON 2015 SURVEY.

TYPES OF WELLNESS INCENTIVES OR REWARDS OFFERED

WHAT WELLNESS INCENTIVES OR REWARDS WERE OFFERED TO EMPLOYEES WHO PARTICIPATED IN WELLNESS INITIATIVES LAST YEAR?



NOTE: N = 143. RESPONDENTS WHOSE ORGANIZATIONS HAD WELLNESS INITIATIVES IN PLACE WERE ASKED THIS QUESTION. PERCENTAGES DO NOT TOTAL 100% DUE TO MULTIPLE RESPONSE OPTIONS. AN ASTERISK (*) INDICATES THAT THE RESPONSE OPTION WAS DEVELOPED FROM OPEN-ENDED RESPONSES.

WHAT DO THESE FINDINGS MEAN FOR THE HR PROFESSION?

- HEALTH CARE COSTS ARE DIFFICULT TO CONTROL FOR MANY ORGANIZATIONS, WHICH MAY EXPLAIN WHY MANY HAVE TURNED TO WELLNESS PROGRAMS AS A MEANS OF TRIMMING EXPENSES. SHRM'S 2015 EMPLOYEE BENEFITS REPORT, FOR EXAMPLE, SHOWED SIGNIFICANT INCREASES FROM 2011 TO 2015 IN EMPLOYERS' PARTICIPATION IN A NUMBER OF PREVENTIVE HEALTH AND WELLNESS BENEFITS, INCLUDING WELLNESS PROGRAMS (GENERAL), HEALTH AND LIFESTYLE COACHING, SMOKING CESSATION PROGRAMS, AND REWARDS OR BONUSES FOR COMPLETING CERTAIN HEALTH AND WELLNESS PROGRAMS. IF THESE INITIATIVES RESULT IN A HEALTHIER WORKFORCE, ORGANIZATIONS CAN CONCEIVABLY SEE COST SAVINGS ASSOCIATED WITH THEIR HEALTH CARE PLANS.¹
- ASIDE FROM CUTTING COSTS, WELLNESS PROGRAMS MAY ALSO BENEFIT AN ORGANIZATION'S RECRUITING AND RETENTION EFFORTS. ALMOST ONE QUARTER (24%) OF EMPLOYEES SAID THAT WELLNESS PROGRAMS WERE A "VERY IMPORTANT" CONTRIBUTOR TO JOB SATISFACTION, AND 54% OF THOSE WHOSE ORGANIZATIONS OFFERED WELLNESS PROGRAMS WERE SATISFIED WITH THEM. MILLENNIAL AND GENERATION X EMPLOYEES WERE MOST LIKELY TO VIEW WELLNESS PROGRAMS AS AN IMPORTANT JOB SATISFACTION CONTRIBUTOR.²

¹ 2015 EMPLOYEE BENEFITS REPORT BY SHRM

² 2015 EMPLOYEE JOB SATISFACTION AND ENGAGEMENT REPORT BY SHRM.

WELLNESS PROGRAMS RESOURCE PAGE: [HTTP://WWW.SHRM.ORG/WELLNESS](http://www.shrm.org/wellness)

FOR MORE INFORMATION AND RESOURCES ON WELLNESS PROGRAMS:

SHRM FOUNDATION'S EFFECTIVE PRACTICE GUIDELINES SERIES

- » EVALUATING WORKSITE WELLNESS: PRACTICAL APPLICATIONS FOR EMPLOYERS
- » PROMOTING EMPLOYEE WELL-BEING: WELLNESS STRATEGIES TO IMPROVE HEALTH, PERFORMANCE AND THE BOTTOM LINE

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