The Business Case for Workplace Wellness Programs

Sun Life-Ivey Canadian Wellness ROI Study

Presented by:
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Sun Life – Ivey
CANADIAN WELLNESS ROI STUDY
2013
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Drivers of Workplace Wellness Research

- Health costs
- Productivity
- Recruitment and retention
Where is the Evidence?

• Academic & grey literatures, & popular press promote the potential of a positive return for employers & benefits to workers

• Employers who want to do the right thing still need to make the business case

• We need evidence, an assessment of studies that are robust & demonstrate analytical rigour, *i.e.*, meta-analytical & systematic
Where is the Evidence?
Harvard: Inclusion Criteria

• Studies had to satisfy the following criteria:

  1. Well defined intervention
  2. Well defined treatment and comparison group (even if not randomly assigned)
  3. Represented a distinct new intervention

>100 Studies included in final analysis
Harvard Study Findings

wellness program

$394/employee

ROI = $3.27

1.7 days/employee

absenteeism

$274/employee

ROI = $2.73
Grossmeier et al.: Inclusion Criteria

- Studies had to satisfy the following criteria:
  1. Published 2005 or later
  2. Only studies with “comprehensive” programs
     - fewer than 7% of US WWPs are comprehensive
  3. Well defined intervention
  4. Well defined treatment and comparison group (even if not randomly assigned)
  5. Represented a distinct new intervention

Studies included in final analysis
Grossmeier et al., Study Findings

wellness program

ROI = $1.73

After 2.2 years
Computerized search yielded 504 studies, we applied strict inclusion criteria.
Meta-analysis Criteria

• The included studies met the following criteria:
  • Experiment & control groups
  • Pre and Post intervention data
  • New intervention (excluded retrospective evaluations of ongoing programs)
  • Length of intervention was provided
  • Days absence reported
  • Sufficient number & quality for meta-analysis
Analysis

• Calculated the difference in pre- and post-intervention changes between experimental & control groups
This wellness stuff looks great!!

This wellness stuff IS great!!
Analysis

- Calculated the difference in pre- and post-intervention changes between experimental & control groups
- Studies were weighted using the inverse of the variance of the differences in means.
Implications for Employers

wellness programs save **1.5-1.7** days of absenteeism

absenteeism ranges from **4.7 to 11.2** days.

(Statistics Canada, 2011)

**14% to 36%** reduction
World Class Conference Presentations

Completed


Accepted

- BAM 2013, Liverpool, UK, “Workplace Wellness Programs: Do they make a difference?”

- Better Workplace Conference, 2013, Halifax, NS, “Sun Life-Ivey Canadian ROI Study” (2 sessions on successive days)
Strong interest in our study and findings

- Annual Health Insurance Invitational Forum (Nov. 2012, Ontario)
- Art & Science of Health Promotion Conference (Mar. 2013, South Carolina)
- Eastern Academy of Management (May 2013, Maryland)
- Canadian Health Economist Study Group (May 2013, Winnipeg)
- Conference Board of Canada – Workplace Wellness and Mental Health (Jun. 2013, Toronto)
- Canadian Economics Association Conference (Jun. 2013, Montreal)
- National Wellness Conference (Jul. 2013, Wisconsin)
- Business of Employee Wellness and Wellbeing (Jul. 2013)
- European Group for Organizational Studies Conference (Jul. 2013, Montreal)
- Internal Health Economics Congress (Jul. 2013, Sydney, Australia)
- Wellness in the Workplace – University of Michigan (Fall 2013, Michigan)
- British Academy of Management (Sept. 2013, Liverpool, UK)
- Better Workplace Conference (Oct. 2013, Halifax)
- HRPA Annual Conference (Jan. 2014, Toronto)
Knowledge Sharing: Media Reports


Where we are now: Phase 2
Sun Life-Ivey Study: Phase 2

- A two year in-field study of a comprehensive wellness strategy
- Implemented by 7 organizations across the country
Sun Life–Ivey Study: Phase 2

• Study implementation
  • Wave 1 – Launched Jan 2013
  • Wave 2 – Launched Mar 2013

• Wellness programs offered as part of the study are based on our best-in-class HealthyRETURNS program model
Best Practice Foundation

Healthy RETURNS...a strategic approach to wellness

- **Assessment**
  to identify top priority risk areas, and establish a baseline and objectives

- **Health Promotion**
  to reinforce and support health and lifestyle improvements

- **Measurement**
  to maintain continuous evaluation and program enhancement
Study Design

Treatment Group
- web portal
- wellness survey
- cardiovascular screening clinics
- health coaching
- education sessions
- health challenges
- online lifestyle modification programs

Control Group
- wellness survey
### Program calendar at a glance

<table>
<thead>
<tr>
<th>Month</th>
<th>Initiatives</th>
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<tbody>
<tr>
<td>Nov-Dec 2012</td>
<td>People leader webinar</td>
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<tr>
<td>Jan 2013</td>
<td>Program launch:</td>
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<tr>
<td></td>
<td>- Communications (portal launch, posters/tent cards, letters from leadership, Passport to Health)</td>
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<tr>
<td></td>
<td>- Interested employees sign up</td>
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<tr>
<td>Feb-Mar 2013</td>
<td>Health Screening Clinics</td>
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<tr>
<td>Apr 2013</td>
<td>Health Coaching</td>
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<tr>
<td>May 2013</td>
<td>Fitness Challenge</td>
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<td>July</td>
<td>Round 1 reporting</td>
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<td>September</td>
<td>Key to Nutrition program</td>
</tr>
<tr>
<td>October - November</td>
<td>Health screening clinics #2</td>
</tr>
<tr>
<td>November - December</td>
<td>Wellness survey #2</td>
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</tbody>
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Program Overview

ABC company

HealthyRETURNS

UPCOMING INITIATIVE
Are You Ready for the HealthyRETURNS Fitness Challenge?

MONTH 3

January 2013

MONTH 4

February 2013
Early indicators

Data and Reporting

*Participation percentages are based on total number of eligible employees at treatment and control group locations. Eligible employees are those who have health benefits with Sun Life.

Survey
- Client A: 93%
- Client B: 66%
- Client C: 82%
- Client D: 65%
- Client E: 62%
- Client F: 82%

Clinics
- Client A: 58%
- Client B: 73%
- Client C: 72%
- Client D: 63%
- Client E: 72%
- Client F: 63%

840 study participants enrolled
Questions?