

# The Business Case for Workplace Wellness Programs

## Sun Life-Ivey Canadian Wellness ROI Study

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Presented by:

Michael Rouse



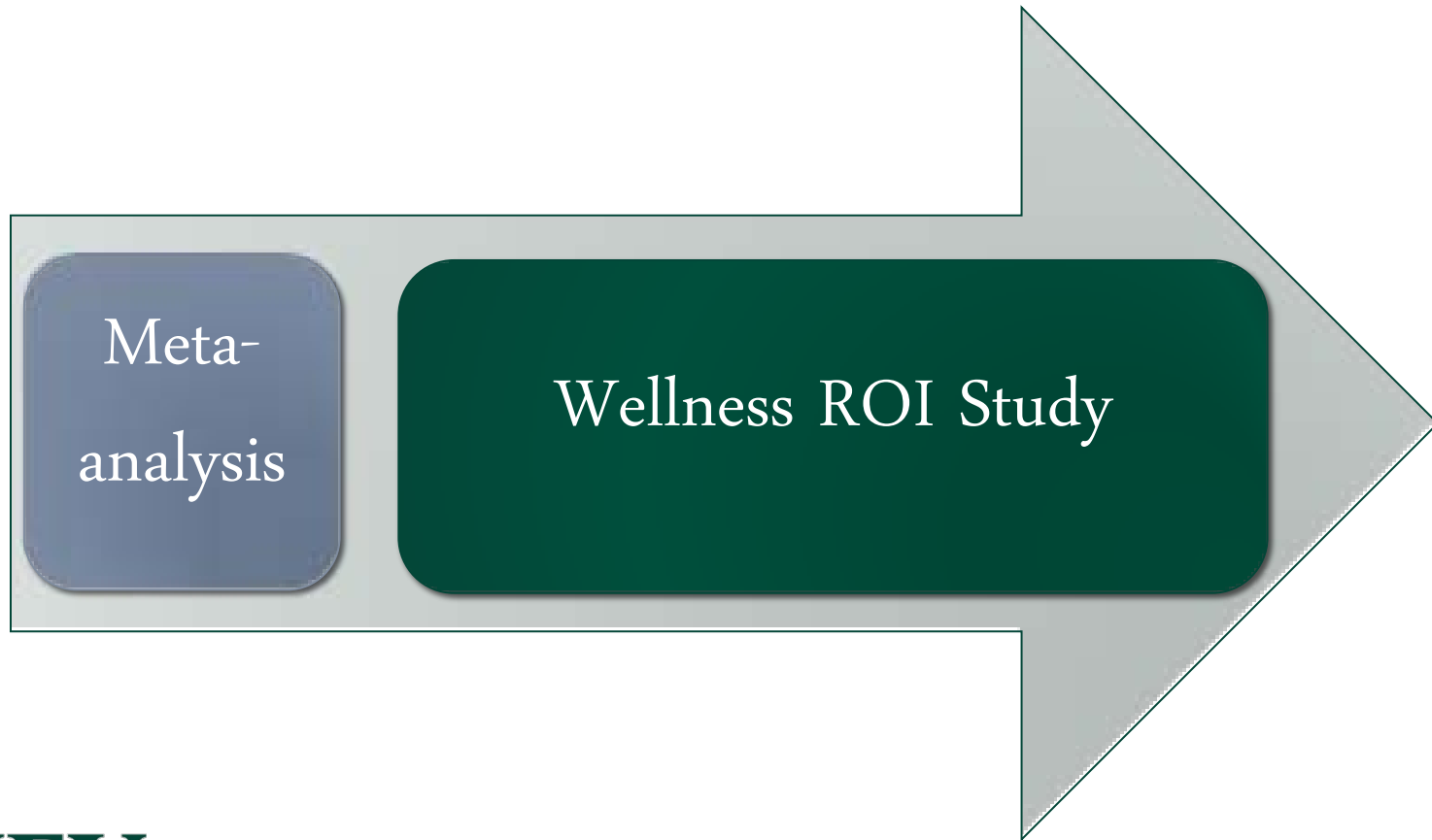


**Sun Life – Ivey**  
**CANADIAN WELLNESS ROI STUDY**  
**2013**



**ALLYSON TIGHE, CHARLICE HURST, MICHAEL J. ROUSE, GREG ZARIC & SISIRA SARMA**

# Sun Life – Ivey Canadian Wellness ROI Study



# Drivers of Workplace Wellness Research



health costs

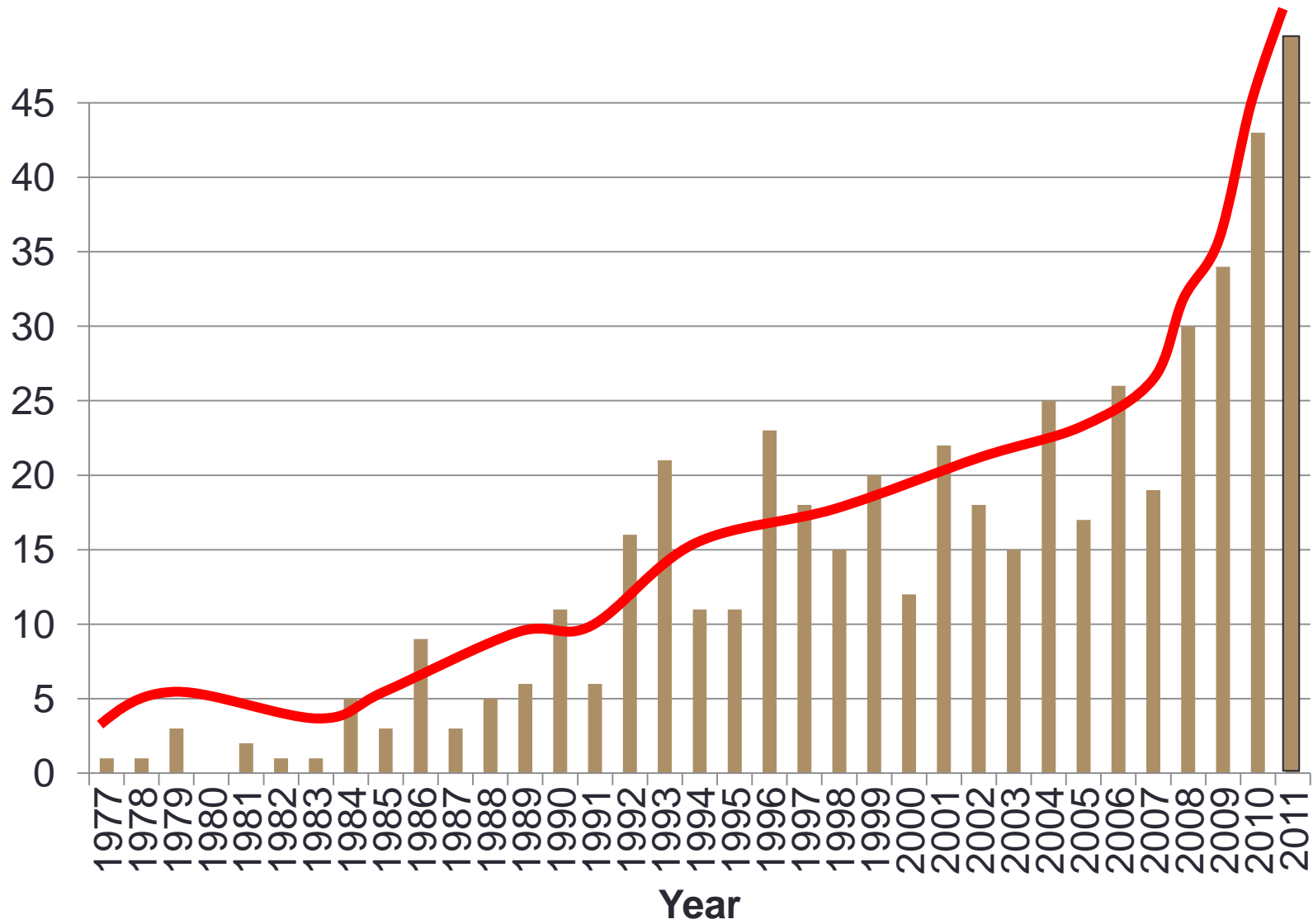
productivity

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

**9** 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

**5**

**Studies  
included in  
final analysis**

# Grossmeier et al., Study Findings

wellness program

ROI = \$1.73

After 2.2 years

# Sun Life-Ivey Study: Phase 1

Computerized search yielded **504** studies,

we applied strict inclusion criteria

**4**

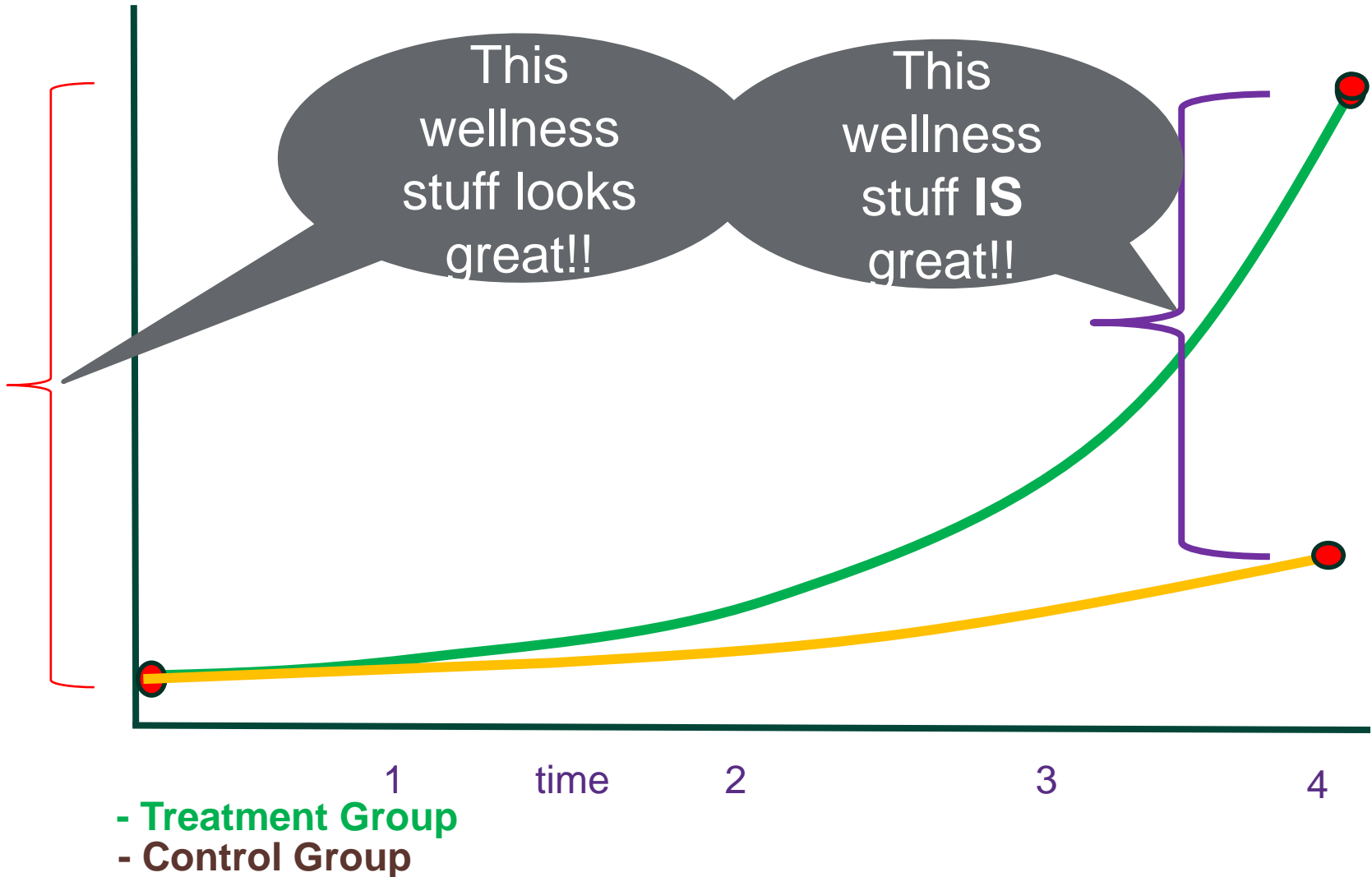
# Meta-analysis Criteria

- 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

# Analysis | Differences in differences



# 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

- Rouse, Michael, Charlice Hurst, Sisir Sarma, Greg Zaric. (2012). “The Business Case for Workplace Wellness Programs,” *Abstracts: 2<sup>nd</sup> International Wellbeing at Work Conference*, Salford Quays, Manchester, UK : 47.

## 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)
- HRP Annual Conference (Jan. 2014, Toronto)

# Knowledge Sharing: Media Reports

- Canadian Occupational Safety (2012) “ROI for workplace wellness”, November 19, 2012, written by Maureen Shaw. Available on, <http://www.cos-mag.com/health-page/health-page-columns/roi-for-workplace-wellness.html> .
- Financial Post (2012) “The Painfully Slow Evolution of Group Benefits,” November 8, 2012, written by Alexandra Lopez-Pacheco. Available on, <http://business.financialpost.com/2012/11/08/the-painfully-slow-evolution-of-group-benefits/> .
- Capital News Online (2012) “A Measure of Our Work: Producing Productivity, Article written by Gemma Karstens-Smith”, November 2, 2012. Available on <http://www.capitalnews.ca/index.php/multimedia/#/a-measure-of-our-work> .
- Benefits Canada (2012) “Addressing the Presenteeism Issue.” Article written by Esther Huberman, October 15, 2012. Available on <http://www.benefitscanada.com/benefits/health-wellness/addressing-the-presenteeism-issue-33190> .
- Benefits Canada (2012) “Sun Life wellness study to find ROI. Article written by Tammy Burns, May 17, 2012. Available on <http://www.benefitscanada.com/benefits/health-benefits/sun-life-wellness-study-to-find-roi-28919> .
- Benefits and Pension Monitor (2012) “Study Launched into Wellness ROI” May 17<sup>th</sup>, 2012. Available on [http://www.bpmmagazine.com/benefits\\_news\\_search.php](http://www.bpmmagazine.com/benefits_news_search.php) .
- Globe and Mail (2011) “Research: New study to quantify benefits of workplace wellness programs. “ *Special Information Feature: Healthy Workplaces, Global and Mail*, Friday, September 9<sup>th</sup>, page 1.

**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 Healthy*RETURNS* 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

Month	Initiatives
Nov-Dec 2012	People leader webinar
Jan 2013	Program launch: <ul style="list-style-type: none"><li>• Communications (portal launch, posters/tent cards, letters from leadership, Passport to Health)</li><li>• Interested employees sign up</li></ul>
Feb-Mar 2013	Health Screening Clinics
Apr 2013	Health Coaching
May 2013	Fitness Challenge
July	Round 1 reporting
September	Key to Nutrition program
October - November	Health screening clinics #2
November - December	Wellness survey #2

# Program Overview

YEAR 1

ABC  
company

HealthyRETURNS<sup>®</sup>

HOME | CONTACT US | FRANÇAIS



**UPCOMING INITIATIVE**  
**Are You Ready for the HealthyRETURNS Fitness Challenge?**  
 Dust off those runners and get ready to participate in the 2012 Fitness Challenge! Form a team of 5 to 10 people, select a team captain and create a fun team name. Exercise, eat your fruits and vegetables and log your progress online.  
**Don't delay, register today! Great prizes to be won!**

**SIGN UP NOW**

WHAT'S HAPPENING

WELLNESS ARTICLES

HEALTH TOOLS

LINKS

**TIP OF THE MONTH**

**INFLUENZA AND YOU!**

It's pretty sure that none of your family members, friends, or direct coworkers will be run down with the flu so soon after this winter. Even if they are, the minute you go shopping at the local grocery store or ride public transit, you are exposed to bacteria that can get you sick if your immune system is unable to provide adequate defense. In addition to receiving ...

→ CONTINUE READING



**COMING SOON ...**

**CARDIOVASCULAR SCREENING CLINICS**

You're invited to check up on your health! In only 15 minutes, you'll receive a personal health assessment that includes your blood pressure, total cholesterol, casual glucose, and body mass index. All conducted right at your workplace by a registered nurse!

Stay tuned for more details!



**REWARDS**

**GETTING HEALTHY HAS NEVER BEEN MORE REWARDING!**

Simply sign up for HealthyRETURNS wellness programs, and not only will you experience the rewards of good health, but you could earn great prizes too! For more details on how you can start earning rewards ...

→ CONTINUE READING



**MONTH 3** **January 2013**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Calendar icon		1	2	3	4	5
6	7 MEETING WITH SUN LIFE FINANCIAL JAN 7 - JAN 11 PROGRAM LAUNCH JAN 7 - FEB 1 <small>(communications, content, portal, Wellness Survey #1)</small>	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	Calendar icon	

**MONTH 4** **February 2013**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Calendar icon					1	2
3	4	5 COMMUNICATION AND REGISTRATION FOR HEALTH SCREENING CLINICS #1 FEB 4 - MAR 1 <small>(insurance and if applicable control groups)</small>	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	Calendar icon	

**MONTH 5**

Sunday	Monday
Calendar icon	

**March 2013**

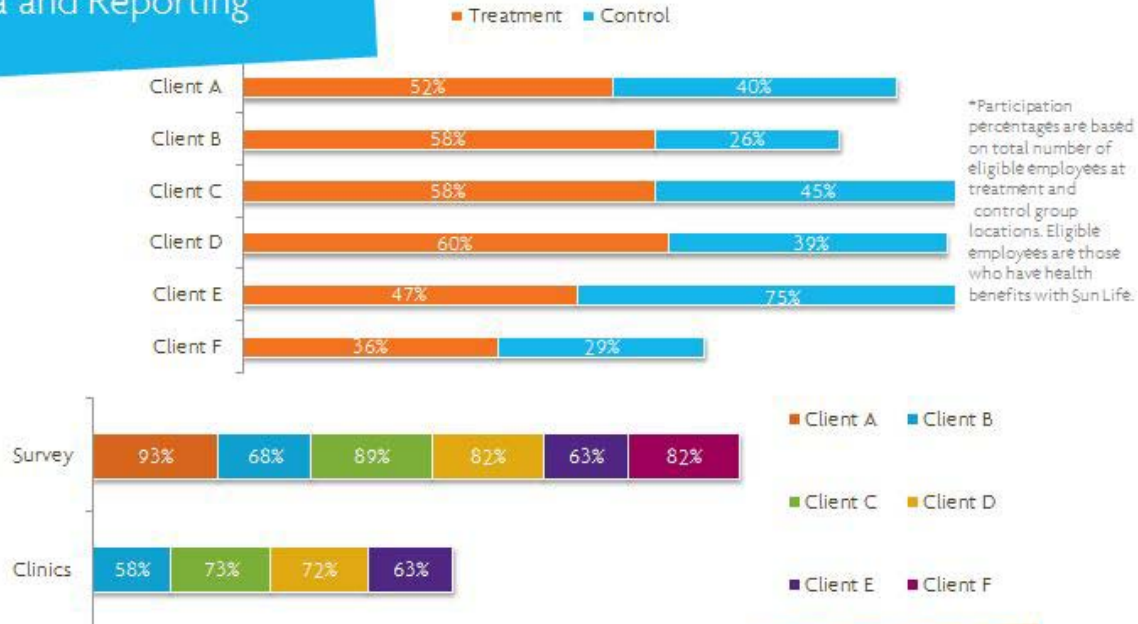
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Calendar icon						
5 HEALTH SCREENING CLINICS #1 MAR 4 - MAR 20 <small>(insurance and if applicable control groups)</small>	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	Calendar icon	

**April 2013**

Thursday	Friday	Saturday
Calendar icon		
4	5	6
11	12	13
18 STATION GE	19	20
26	27	Calendar icon

# Early indicators

## Data and Reporting



\*Participation percentages are based on total number of employees registered in the ROI Study at treatment group locations.

840 study participants enrolled

Questions?