



Workplace Wellness: Calculating Your ROI

Wellness issues important to you – brought to you by the insurance specialists at JRG Advisors, LLC.

So now that you've created a wellness program, it's imperative that you determine whether your efforts are actually paying off. In other words, you must calculate the return on your investment, or your ROI. Here's all you need to know about calculating your ROI to ensure that your wellness program evaluation is useful and effective.

Why Evaluate Your Wellness Program?

- **To gather feedback about your initiatives to improve programming efforts in the future.** By gathering feedback on a regular basis about your wellness efforts, you can make modifications and improvements to your program. Without feedback, you will not know how or where to make changes.
- **To show the value of your program.** By collecting data concerning how your program has influenced and changed your employees, you can make a case for the value of the program's existence and need for funding.
- **To calculate change.** ROI information will help you determine how much positive change is actually occurring from wellness efforts. Information like employee satisfaction with the program, behavior changes, biometric measures and test data will demonstrate how your program has affected the lives of your employees.
- **To secure funding for the future of your program.** ROI data will enable you to prove that your program has value and is worth funding, even in tough economic times.
- **To establish accountability for your efforts.** ROI data will show what you've actually accomplished and have been working towards.
- **To compare the success of different intervention efforts.** Evaluating various programs and then comparing their success allows you to determine what programs are of the most value to your organization. Then, you can repeat these efforts again and modify or eliminate those that were not as successful.

What Factors Should You Evaluate?

➤ **Participation**

- Tallying participating for the various activities in your wellness program will show you what is of interest to your employees. At the most primitive level, this information allows you to see what efforts attract your target audience the most.

➤ **Employee Satisfaction with the Program**

- This information reveals how much people enjoyed your wellness program initiatives.
- Use this opportunity to allow people to provide suggestions, modification recommendations and applaud your efforts.

➤ **Behavior and health habit changes**

- While executing your wellness program, obtain information about your employees' health and habits before the program begins and then after certain events have commenced. Use this data to determine if your efforts positively changed their behaviors.

➤ **Biometric measurements**

- Measurements include blood pressure, weight, body mass index (BMI), etc.
- Use this information to demonstrate how your efforts have positively changed quantifiable measurements, especially to senior-level management and those who do not see the value of your wellness program.

➤ **Productivity changes**

- Productivity may include missed days of work, time away from work tasks, etc.
- Gauging an improvement in productivity will yield information regarding your program's impact on your employees' health and well-being. This information is just as important as positive changes in your employees' physical health.

➤ **Medical claims**

- According to the Wellness Council of America (WELCOA), 25 to 40 percent of all medical claims are changeable, which means they are also avoidable. If you conduct an analysis of potentially modifiable healthcare expenses, you can focus your efforts on targeting ailments that yield the most medical costs.

How Can You Evaluate Your Wellness Program?

- Obtain program registration sheets to see who is attending wellness events and how popular events are to your employees.
- Conduct participation surveys during and after wellness program efforts.
- Administer self-reported behavior surveys.

When Should You Evaluate Your Wellness Program?

➤ **On an ongoing basis for...**

- Participation and attendance to wellness events.
- Satisfaction surveys for wellness efforts.

➤ **On an annual basis for...**

- Personal health assessments and Health Risk Appraisals (HRAs).
- Health fairs that include personal health screenings.
- Wellness interest surveys.

➤ **On a bi-annual basis for...**

- Modifiable medical claims analysis and a company health and productivity audit. These items do not change frequently from year to year, and therefore, do not need to be done often.

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