

Sun Life-Ivey Canadian Wellness ROI Study Update

The Sun Life-Ivey Canadian Wellness Return on Investment Study is a workplace wellness research study conducted by Sun Life in alliance with the Ivey Business School at Western University. Read on for a summary of the preliminary results.

OPPORTUNITY

Establish **Canadian benchmarks** on the return on investment (ROI) for workplace wellness



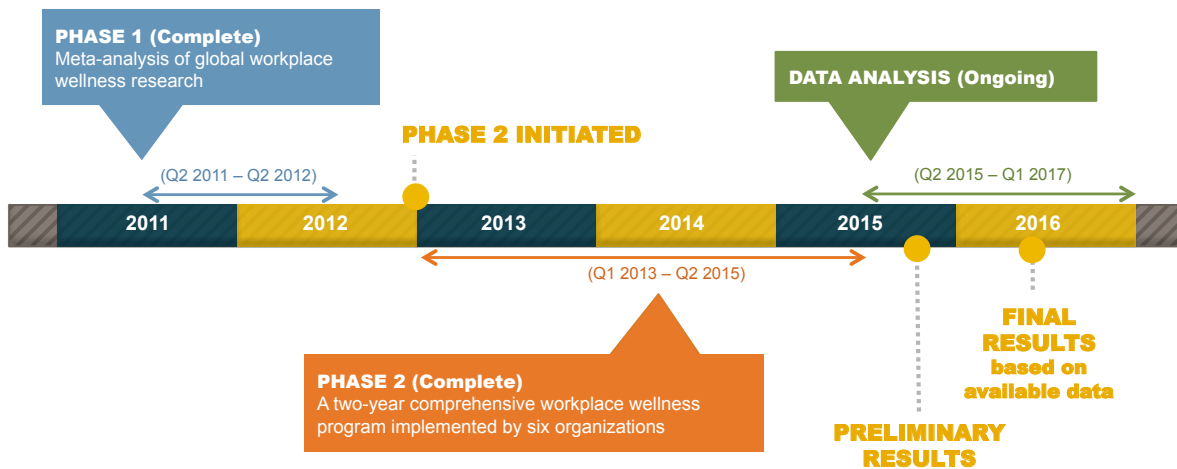
Contribute to best practice research to help organizations **maximize the value** of their wellness strategy

ABOUT THE STUDY

The Sun Life-Ivey Canadian Wellness Return on Investment (ROI) Study is the first study in Canada to use a control group to measure effectiveness of workplace wellness programs. It's an exciting multi-year study that seeks to establish Canadian benchmarks on the return on investment for workplace wellness. The goal of this study is to make a significant contribution to best practice wellness research and help organizations understand and maximize the value of wellness in the workplace.

To ensure a high level of academic rigour, the Ivey Research Team designed a methodology that focused on comparable treatment and control groups, and reviewed multi-faceted data sets on an individual level, rather than aggregate. This provided a detailed picture of the impact a workplace wellness program can have, and what employers can do to best support a healthy workplace for their employees.

FIGURE 1: WELLNESS ROI STUDY TIMELINE



PHASE 1 - Was a detailed review of global workplace wellness research that met strict criteria for consideration. The analysis found that reduced absenteeism was strongly correlated with wellness programs. The phase 1 review of non-US wellness programs further suggested that firms can save about 1.5 days in absenteeism per employee over 12 months, or an estimated \$251 per employee per year in savings.

PHASE 2 - A treatment vs control group study that included a two-year wellness program implemented by six organizations in 28 sites. This phase provided the data that Ivey Researchers are currently investigating. Some **preliminary results** are summarized below. **Final results** will be shared later in 2016.

FIGURE 2: WELLNESS PROGRAM SERVICES OFFERED (PHASE 2)

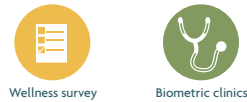
TREATMENT GROUP



CONTROL GROUP 1



CONTROL GROUP 2



EMERGING THEMES

Preliminary findings reinforce workplace wellness best practices of first identifying key opportunities to strengthen the health of the work environment and lay the foundation for a successful wellness program; then carefully selecting solutions according to most pressing health risks. Five key elements of success that have been validated through this study include:

Leadership Commitment to health and wellness.

Organizational Practices Policies and practices reflecting a culture of health and wellness.

Organizational Health Evaluation Ongoing assessment and evaluation.

Programming Effective programming according to most pressing health risks that motivate employees towards healthy behaviours.

Communication Keeping wellness top of mind; integrating with leadership and HR communication.

THE ORGANIZATIONAL WELLNESS INDEX: A KEY MEASUREMENT TOOL

The **Organizational Wellness Index** was developed by the Ivey Research Team as part of the study and is a new contribution to the field of wellness research. It is a unique approach to measuring organizational wellness and health metrics based on five categories of metrics: workplace culture and engagement, nutrition, physical activity, stress, and tobacco and alcohol. This index was used to measure organizational wellness within the study.

FIGURE 3: ORGANIZATIONAL WELLNESS INDEX

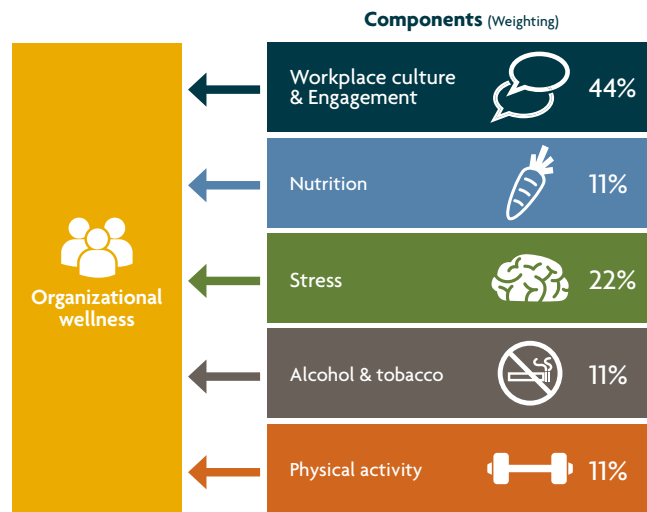


FIGURE 4: PRELIMINARY RESULTS (ORGANIZATIONAL WELLNESS INDEX SCORE % CHANGE FROM BEGINNING TO END OF STUDY)



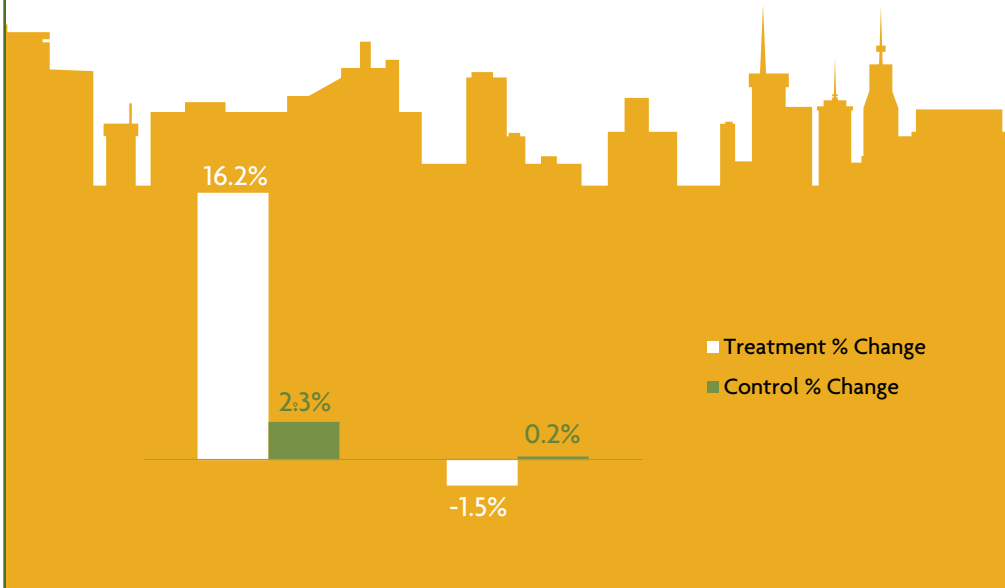
“According to the World Health Organization, **chronic disease** can be prevented in many cases. If related risk factors were eliminated, at least **80%** of all heart disease, stroke and type 2 diabetes would be prevented; over **40%** of cancer would be **prevented.**”

World Health Organization, Preventing chronic diseases: a vital investment, 2005.

COMPARISON OF TWO COMPANIES

The preliminary findings further support the idea that a wellness program is most impactful when placed on a healthy foundation – one that focuses on prevention. Further analysis suggested that when compared, the company that demonstrated more commitment to the 5 success elements (Company X) obtained significantly better results than the company impacted by considerable organizational changes – restructuring and staff turnover being factors (Company Y).

FIGURE 5: OVERALL WELLNESS SCORE % CHANGE - TWO COMPANY COMPARISON



STUDY CONSIDERATIONS

Sample size

The study engaged 820 consenting study participants across six organizations at 28 sites.

Study duration

Participating employees had access to wellness programs for two years.

Rapidly changing organizational health and wellness landscape

The study designed in 2011 has a primary focus on physical health.

Standardized offering

The comprehensive wellness program and its implementation was standardized for the participating organizations.

Organizational changes

Changes such as acquisition activity, restructuring and other impacts were experienced by some of the participating employers.

THE VALUE OF WELLNESS – A LOOK AT THE DATA BEYOND THE STUDY

Beyond the return on investment, there is significant value employers can achieve from a preventative approach. In analyzing three years of collective wellness data, Sun Life found that improvements have been demonstrated in employee health, knowledge and risk reduction. More specifically, repeat screening clinic participants from Sun Life's book of business (not study related):

- Were given support and education to reduce their risk of disease
- Were made aware of their own state of health
- Were given the knowledge and tools with which they could achieve a healthier lifestyle.

The results of the ROI Study to date, together with Sun Life's experience, suggests key outcomes and trends that support workplace wellness programs. Sun Life is already putting into practice programs to better support plan sponsors. Having seen that a robust wellness program can reduce the risk of preventable conditions and increase employee engagement, Sun Life is continuing to work with wellness programs such as:

- **Sun Life HealthySTART™** - This service includes an Integrated Data Analysis, Health Risk Assessment or Employee Wellness Survey, and strategic recommendations to develop an insights-driven wellness strategy that is tailored to the organization's specific needs.
- **Sun Life HealthyFOCUS™** - Targeted solutions offering prevention initiatives, education, and health resources to address specific chronic health conditions.
- **Health and Wellness Strategic Consulting** - Starting with an assessment of an organization's policies and programs against best practices, this service aims to help employers strategically plan a prevention strategy to meet employee and business needs.
- **Workplace Mental Health Consulting** - Developed in line with the National Standard for Psychological Health and Safety, this service includes an organizational assessment and strategic planning to help employers effectively manage workplace mental health.

ROI STUDY IN THE SPOTLIGHT

Interested in learning more about the study? Join us at these events:

- [Listen to the webinar](#) sharing preliminary results of this study, hosted through HR Reporter on November 12, 2015
- [London HRPA](#), London ON (MARCH 31, 2016)
- [Le Rassemblement Conference](#), Workplace Health and Wellness conference, Quebec (APRIL 6-7, 2016)
- [Ivey Idea Forum](#), Toronto (JUNE 7, 2016)
- [CPBI Western Regional Conference](#), Whistler, BC (OCTOBER 5-7, 2016)
- [Better Workplace Conference](#), Vancouver BC (OCTOBER 24-26 2016)
- HR Reporter Webinar, National (NOVEMBER 2016)

www.sunlife.ca/wellnessROIstudy

WHAT'S NEXT

Stay tuned for additional results including an analysis of return on investment. Watch this space!

Questions regarding ROI Study? Contact Erin Dick (Erin.Dick@sunlife.com) or visit sunlife.ca/wellnessROIstudy