

Welcome to the SIG University
Virtual Roundtable Series

Part Three: Roundtable Working Session

HR Strategy and Tactical Considerations

Sarah Sheckells | *Human Resource Executive*

June 4, 2020



REMINDER

Your feedback is important to us.

COMPLETE OUR SURVEY**

One survey will be chosen to win a \$100 donation to the charity/cause of your choice, in your name.

**Congratulations to last week's winner, Deidre Carroll.
We are proud to support the MDSPCA on your behalf!**





UPCOMING WEBINARS

JUNE 9TH, 10 AM – 11 AM EST

What Comes Next: Re-Opening the Workplace

Presenter: Doug Desmarais, Esq., *Smith & Downey*

JUNE 10TH, 12 PM – 1 PM EST

Affordable Care Act Update: What's New with the ACA

Presenter: Stacy Barrow, Esq., *Marathas Barrow Weatherhead*

****New: June 11th stay tuned for more details***

JUNE 16TH, 10 AM – 11 AM EST

Manager Training

Presenter: Doug Desmarais, Esq., *Smith & Downey*

COVID-19 UPDATES

Visit our Coronavirus Resource Center for legal updates, webinars, whitepapers and more!

<https://aleragroup.com/coronavirus/>

ALERAGROUP Furloughs, Layoffs and More:

HR's guide to employee issues during COVID-19 (and beyond)

Road Map: Reopening A Worksite

Your workforce strategy before and after this crisis involves a lot more than "return to work." The health of your employees and clients, a fast-changing regulatory environment, potentially long term changes to how we work, and new or increased risks from both remote and on-site work.

At Alera Group, we provide comprehensive support to employers through our risk management, employee benefits, wealth management and human resources services, all of which are especially relevant during this crisis. If you need help crafting or executing your work strategy and playbook, talk to your advisor about how we can help.

Step One:

Pick a Champion

Your return to office champion can help implement changes, gather feedback and think through the unique elements of your organization's layout and needs.

Build a Plan for the Future

Future Crisis Planning

Learn more about this and other key topics with Alera Group!

- [Rethink and Reset Your Workforce During COVID-19](#)
- [COVID-19 Industry Impacts Whitepaper](#)
- [Employee Pulse Survey](#)



Need Help?

Ask your Alera Advisor for:

- [Industry Impacts White Paper](#)

For Comprehensive Planning and Strategic Thinking on:

- Remote Workforce Considerations
- On-Site Workforce Considerations
- General Workforce Considerations

Ask for Alera's HR Consulting and Support Services

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As an employer considers introducing a wellness program to their employees, there are several decisions to consider to ensure that the organization has the sustainable foundation to support any long-term well-being initiative.

We believe the term "well-being" is a more accurate and complete description of health as compared to the conventionally used "wellness." Wellness can sometimes stimulate limited perceptions amongst employers who want to focus solely on physical health. Alera Group has embraced the foundational research from the Gallup Organization and the resulting published work by T. Rath and J. Harter.

Well-being: The Five Essential Elements, to represent a more comprehensive approach to the idea of being "well." We encourage employers to consider including elements of career, financial, emotional, social, physical, and community into their "well-being" strategies.



Identifying Internal Support

Leadership buy-in is one of the most fundamental elements to establishing a well-being effort to ensure long-term support for the program through staffing, budget and resources. Some considerations include:

- ☐ Has well-being been incorporated into your organization's mission and strategic plan?
- ☐ Is leadership aligned surrounding the well-being efforts you are looking to offer?
- ☐ Will leadership support employees to participate in well-being efforts during working hours?
- ☐ Is leadership willing to participate in well-being efforts hosted by the organization to act as a role model to employees?
- ☐ Will leadership support any financial investment into well-being?
- ☐ What results is leadership looking to see as an outcome of a well-being program?

Establishing a **financial budget** is another core element if you intend to leverage resources beyond those available through your benefit carriers. This budget could include resources for events and activities sponsored by the committee, resources for your organization to improve health, safety and ergonomics, or career development activities.

- ☐ What budget are you willing to denote towards wellness / well-being efforts?
- ☐ Are there criteria that would need to be met before assigning this budget?
- ☐ What is the approval process for any well-being committee budget requests?
- ☐ Does leadership have any expectations in terms of progress reporting (e.g. participation, results, etc.)?

Program incentives are often an inherent component of well-being programs to help drive engagement. Incentives don't always need to be financial-based, but can also include creative solutions like Volunteer Days, Employee Recognition Awards, etc. Consider the following questions:

- ☐ Will you be offering incentives for participation in any elements of your well-being program?
- ☐ Will incentives be in-kind, cash reward, premium-based, etc.?
- ☐ Does your corporate budget include an offset for well-being program incentives?

There are federal regulations that dictate the limits of incentives employers can award employees in relation to a wellness program. We encourage you to have this conversation with your consultant to ensure that your incentive program aligns with federal guidance.

Defining a Well-being Strategy

Collecting data is a good initial strategy to developing a well-being program within your organization. Not every group has access to claims data that would identify medical conditions, so there are other methods of getting information to help develop your program. Strategies to consider include:

- ☐ Reviewing claims details for behavioral or lifestyle impacted conditions (e.g. hypertension, overweight / obesity, hyperlipidemia, diabetes, etc.)
- ☐ Distributing an employee needs and interest survey to evaluate activities or topics that employees would participate in.
- ☐ Assessing feedback from leadership and middle management to identify needs within specific areas of the organization and operating teams.
- ☐ Biometric screening events can supply the organization with baseline information about health risks amongst the member, but should be used judiciously.
- ☐ Identify any cultural considerations within the organization to be considered.

Developing a **Well-being Strategic Plan** is a great way to stay on track through the year. It's ideal to help identify SMART goals and objectives for your well-being program that are Specific, Measurable, Attainable, Relevant, and Time-Based to guide your well-being committee. By creating achievable and attainable goals, the well-being committee can demonstrate to leadership their current successes and it provides a stepping stone for future programs as the well-being committee continues to have a presence within the organization.

- ☐ SMART goals should include the who, what, when, and how of each program activity.
- ☐ Think in the long term, not just for this year, but what you would like your organization's strategy to be over then next 2 – 3 years.
- ☐ Consider the outcomes you would like to see from your program and what partners you can work with to help achieve those outcomes.

As your organization or committee develops strategies for the year, consider **initiatives that support the whole person**, addressing all elements of well-being. Some suggestions are included in the chart to the right:

- ☐ Add programs or solutions that align with your employee's needs.
- ☐ Other elements of well-being can have a strong influence on an individual's health.
- ☐ Studies done by Gallup have demonstrated that while 66% of people are doing well in at least one of six areas of well-being, only 7% of individuals are thriving in all areas.

Well-being	Program Considerations
Financial	Budgeting, Credit Counseling, Tuition Repayment, College savings programs, 401K & Retirement planning
Career	Peer mentoring programs, Job Development and Growth paths, Education support
Emotional	Emotional Assistance Programs, Behavior Health Counseling
Social	Social Activities, Committee-Sponsored Activities, Corporate Events
Physical	Well-being Challenges, Gym Membership Programs, Activity Challenges, Nutrition Counseling, Coaching, Wellness Strategies, Disease Reversal Programs
Community	Organization-supported causes, Community Service, Charity Races

Another core element that many employers forget after hosting a well-being program, but has massive implications is **evaluating success**. Defining what success means for your program, enables you to measure the impact of your program and whether you have met outcomes along the way.

- ☐ Evaluation after the completion of the program enables employers to discern what went well, what could be improved, and how that information can be translated to other wellness initiatives.
- ☐ This feedback can be used to make changes to future programs.
- ☐ Example definitions of success might include having "X" number of participants attend an event, obtaining 100% satisfaction scores after a program, meeting the goals outlined in the program action plan, or through other means of measurable outcomes (e.g. 10% of participants walked 10,000 steps on average per week during the program).

Communication & Engagement Strategies

Effective communication and **employee engagement** often go hand-in-hand with any well-being program. Marketing the program, as you would any other benefit, helps to generate awareness and create enthusiasm about the program amongst your employees.

- ☐ **Share the "Big-Picture" Reason.** Helping individuals understand the "why" behind the programs your organization is offering can go a long way with creating a positive energy around the solutions you are offering.

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EMPLOYEE ENGAGEMENT: **REVISING OUR PLAYBOOK**



A serene tropical beach scene at sunset. The sun is low on the horizon, casting a warm, golden glow across the sky and reflecting on the calm turquoise water. The sky is filled with soft, white and orange-tinted clouds. In the foreground, gentle waves with white foam wash onto a pristine, light-colored sandy beach. To the left, a small strip of land with palm trees and lush greenery is visible. The overall atmosphere is peaceful and idyllic.

OUT OF OFFICE

Employee Engagement

How are we doing?

- **90% of companies believe their culture has improved**
- **83% believe their employee experience is better**
- **84% believe employee engagement has gone up**

Employee Engagement

What are we doing?

- Protecting our people as much as we can
- Focusing on personal productivity, well-being and resilience



What are we doing?

- Acknowledging and acting on learning opportunities – especially for our leaders!
- Recognizing that working from home can work well



**Employee
Engagement**


LET'S BREAK!

Breakout Instructions and Questions



INSTRUCTIONS

- Say hello!
- The person whose first name is closest to letter A is the facilitator.
- The person whose first name is closest to letter Z is scribe and the person who reports out.
- Discuss these questions:
 - Have you or will you make changes to existing employee engagement practices?
 - What changes have you made?
 - How have they been received?
 - What new or creative strategies are you considering?
 - Will you do an employee engagement survey this year?
 - If you have done one, how did you feel about the results?



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- What changes have you made?
- How have they been received?

What new or creative strategies are you considering?

Will you do an employee engagement survey this year?

- If you have done one, how did you feel about the results?

LET'S DISCUSS



PTO

- Impose fixed or conditional blackout dates during expected busy times.
- Give priority to 'essential' employees who continued to work during this time and who continue to work remotely full-time
- Limit, defer or halt the future accrual of PTO that are in excess of what is legally required.
- Insert a 'cap' on PTO hours that will carry over into 2021
- Offer pay-out ('buy out') of accrued but unused PTO, such as at the end of 2020.
- For employers with 'unlimited' PTO policies, consider whether these policies need to be adjusted on a temporary basis or go-forward basis to account for business needs.

Why do we need to revise our playbook?

- Improved interpersonal relationships
- Increase in trust for leadership teams
- Stronger focus on teams vs individuals

FINAL THOUGHTS



RESOURCES



Articles

May 22, 2020: *Employers Consider Changes to PTO Policies as Unused Vacation Days Accumulate*

May 26, 2020: *Silver Linings: Managers See Upsides During the Pandemic: Amid the uncertainty, anxiety and on-the-job pressures during the COVID-19 crisis, managers tell of bright spots*

May 29, 2020: *Remote Workers Experiencing Burnout: Many report neglecting earned PTO*

Webcasts

Driving Culture Through Connection

View live: June 4, 2020, 12 p.m. ET / 9 a.m. PT

Creating a Culture of Connection and Empowerment

View live: June 12, 2020, 12 p.m. ET / 9 a.m. PT

THANKS TO SARAH!



BLACK LIVES MATTER

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WE CALL FOR
**SUSTAINABLE
TRANSFORMATION**

IN OUR COMMUNITIES

SEE THE DEMANDS

SIGN THE PETITION

TAKE ACTION

Join the Movement to fight for Freedom and Justice by signing up for updates, checking out our resources, following our media, or wearing our dope, official gear.

COVID-19 HELP

Use the quick links to:

- Add your name to the [petition](#)
- Find [resources](#) with information and receive aid during this pandemic

Thank You for Attending

Check your email for your HRCI/SHRM Certificates.

Complete your survey!

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