

TOOLKIT

EMPLOYEE WELLBEING MEASUREMENT AND METRICS GUIDE 1 | GETTING STARTED

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CONCLUSION

INTRODUCTION

Why measure employee wellbeing?

- Measurement will help you to:
- Identify whether there are any issues that you need to address
- Identify what the issues are
- Identify who is particularly affected by them (e.g. a particular demographic group, particular job roles)
- Identify whether there are any hot spots in the organisation (e.g. particular teams or divisions affected)
- Conversely, identify whether there are any areas of good practice, e.g. lower incidence rates
- Demonstrate possible impacts of these issues such as costs in human terms and reputational terms as well as financial terms
- Put together the business case to challenge and inform your board or exec team
- Inform your health and wellbeing strategy
- Identify key stakeholders
- Target interventions and key areas for improvement
- Establish baselines that you can use to measure progress

This guide is part of a three-part series, intended to support organisations seeking to improve their approach to measurement of employee health, wellbeing and engagement.

Guide 1: Getting Started is aimed at supporting organisations that are at a relatively early stage of measuring their activity. It provides an introduction to the Business in the Community Workwell Model as a framework to evaluate your approach to health, wellbeing and engagement, and sets out some basic categories to help you classify your activity, in terms of preventative, early intervention, and rehabilitation. The remainder of the Getting Started guide offers suggestions of basic ways in which you may wish to measure your activity. Please refer to the other guides in this series for additional content on each of these topics.

GETTING STARTED WITH EVALUATING THE IMPACT OF YOUR WELLBEING PROGRAMME

Evaluating the scope of your programme: a simple gap analysis using the Workwell Model

[Business in the Community's Workwell Model](#) sets out a framework for embedding health and wellbeing into organisational culture. The aim of the model is to help businesses create environments where individuals and organisations can be at their best by taking a preventative, whole-person, whole-organisation approach to health and wellbeing. The model can be used to check that your health and wellbeing work includes elements which address each aspect of the model.



At the centre of the Workwell model are five areas of employer responsibility:

- Leadership
- Better Work
- Better Management
- Better Specialist Support
- Better Health and Wellbeing

Leadership

Leadership sits at the heart of the model. Are you taking a whole organisation approach? This requires responsible leadership where the strategy is owned and championed by the board. This results in both collective ownership and a wellbeing strategy that is aligned to core business objectives.

Better Work

Are you taking steps to create good work and improved job quality, designed to enhance personal health and wellbeing and mitigate workplace stress factors?

Better Management

Are you taking steps to develop line managers' capabilities and provide training and resources, so they are empowered to support the health and wellbeing of their direct reports?

Better Specialist Support

Are you ensuring resources and mechanisms are in place to support both early intervention and long-term wellbeing challenges, including workplace modifications and active rehabilitation for a phased return to work?

Better Health and Wellbeing

Are you being proactive and preventative about employee wellbeing, enabling and encouraging employees to take responsibility for their own health and wellbeing? Wellbeing includes physical, mental, financial and social health and wellbeing.

Inclusive culture and collaboration with stakeholders wraps the model, as they act as enablers to make a wellbeing strategy work.

Evaluating the balance of primary, secondary and tertiary approaches

As you consider your interventions, we recommend assessing what action you are taking at the primary, secondary and tertiary levels, to ensure there is a good balance between included in your programme, that will focus on preventative and reactive, and short and longer term outcomes.

Primary approaches

These are preventative measures such as health screening, healthy eating and activity campaigns, or training in resilience and energy management.

Secondary approaches

These provide early intervention such as mental health awareness training and signposting of sources of help and support, Employee Assistance Programme (EAP) services, or discretionary unpaid or paid leave to address personal or family problems.

Tertiary approaches

These provide rehabilitation and, hopefully, return to work and/or full function after a period of ill health. These would typically be services provided by specialist providers, such as occupational health, private healthcare referrals or the NHS, as also include an organisation's policies and procedures for managing a phased return to work and reasonable adjustments.

You can find further detail and examples of primary, secondary and tertiary approaches in our partner-only guide to Securing Senior Buy In, see your wellbeing adviser for access

Simple metrics for evaluating the success of your programme

Businesses need to create a baseline of the employee's needs and wants, then measure forward from the baseline. It is important to understand what the employees want from the programme and that you have their buy-in as you set goals to measure against. Clear goals will provide you basis for measuring your achievement and learning, by allowing you to see if you have reached your critical success factors.

Some simple metrics you can use to measure the success of your health and wellbeing programmes include:

- Participation rates
- Satisfaction ratings
- Intentions to change behaviour / actual behaviour changes
- Health impacts – how key metrics change over time
- Changes in employee engagement scores
- Changes in responses to specific questions such as, 'I believe the organisation cares about my wellbeing'



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GETTING STARTED WITH MEASURING GENERAL HEALTH AND WELLBEING

The Office for National Statistics measures health and wellbeing on a yearly basis using the below measures:

- Life satisfaction
- Feeling that what one does in life is worthwhile
- Happiness yesterday
- Anxiety yesterday

The findings are taken from the [Annual Population Survey \(APS\)](#) with responses to the personal wellbeing questions from around 165,000 people. This provides a large representative sample of adults aged 16 and over living in residential households in the UK. The recent findings have shown that personal wellbeing has improved each year since 2012. People in London generally showed a lower personal wellbeing on average than the rest of the UK but have seen improvements in measures of wellbeing.

In the UK, progress has been made, but there is still a pervasive culture of silence in the workplace around mental health. While there is greater awareness of the issue, there is still a disconnect between employer's intentions and perception, and the actual occurrences in the workplace. Business in the Community's Wellbeing campaign has published the [Mental Health at Work 2019](#) Report. As we enter the fourth year of assessing mental health in the workplace with fresh eyes, we are seeing some encouraging improvements. But a lot of work is still ahead.

It is important to establish a baseline of employee mental wellbeing priorities through staff consultation, ensure wellbeing is both the employee and employer responsibility and commit to continuous improvement through staff participation. The Mental Health at Work 2019

Report calls to action and recommendations show effective ways to tackle these issues.

The Responsible Business Tracker®

The Responsible Business Tracker® is a measurement tool available to all Business in the Community (BITC) members. It enables an assessment of performance as a responsible business by tracking progress against BITC's Responsible Business Map, which Health and Wellbeing is a key component of. The questions ask whether employers are taking a preventative, whole person, whole organisation approach, where senior leadership is held accountable. A strategy owned and driven by senior leadership is essential to success. The tracker, therefore, asks how the business is doing to make health and wellbeing strategic boardroom issues.

The Tracker offers gap analysis, benchmarking against sector peers and the overall cohort. Scoring data can be leveraged internally to create traction for change.

Absence data

There are three key metrics which should be measured as a minimum. These are:

- Absenteeism
- Causes of absence
- Duration of absence

If you measure nothing else to start with, measure and track trends in your absenteeism rates.

Note that stated causes of absenteeism may not reflect the true cause. People are often unwilling to cite stress, depression, anxiety or other mental ill health as a cause of absence for fear of stigma

and discrimination. They may attribute it to other causes such as digestive problems, back problems or flu. It is therefore important to measure and monitor mental health and wellbeing separately. There is guidance on how to do this later in this document.

Other basic metrics and KPIs for general health and wellbeing

Other basic metrics you could measure include:

- Staff turnover rates
- Reasons for leaving (exit interviews data)
- Number of staff who have flexible working arrangements and the nature of those arrangements
- Referral rates to/by Occupational Health
- Disclosed health conditions – number and nature of these (anonymised from pre-employment questionnaires and/or HR records)
- Aggregated statistics from employee health assessments e.g. number of employees who smoke, are overweight, cholesterol levels, blood pressure etc.
- Number, nature and cost of health-related insurance claims (e.g. income protection, private medical)
- Health assessment data
- Tracking employee uptake of the programme – shows the effectiveness of your communication strategies. See your wellbeing adviser to access BITC's toolkit on 'Communicating a Successful Wellbeing Strategy', for ways to develop an effective communication strategy.

Monitoring absence due to stress and mental ill health

Effective absence management means supporting employees with health problems to stay in or

return to work. Return to work programmes and flexible working opportunities need to be available and form part of the absence management strategy, focusing on wellbeing and health promotion can help avoid absence problems developing. See your wellbeing adviser to access BITC's 'Agile Working and Wellbeing' factsheet for more information on the impact agile working has on the wellbeing of the employee and the business benefits. Ways to measure absence include:

- 'lost time' rate
- Frequency rate
- persistent short-term absence rate

However, as noted above, this data may not be reliable, so it is important to consider other data and ask other questions to assess employee mental health and wellbeing.

Please note: It is normal for the number of reported cases of poor mental health to initially increase due to improved disclosure.

Employee Assistance Provider and Private Medical Insurance statistics

If you have an EAP (Employee Assistance Programme) or PMI (Private Medical Insurance) ask your provider for data on the number and nature of support that is requested in relation to mental health. This could provide an indication of trends related to poor mental health and wellbeing, and what kind of services people are seeking to support them.

It is always important to reassure employees of the confidential nature of the services they use and to remind them that no data is given out that could ever identify individual employees.

Simple questions to ask about mental health and wellbeing

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There are a few simple questions that are used by some of Business in the Community's members which serve as a proxy for mental health and wellbeing. You could include one or more of these in your staff survey, or track responses to them on a more regular basis.

'How productive do you feel on a day-to-day basis?'

This is a useful question to ask as it may help to reveal low or sub-optimal levels of mental health and wellbeing, despite good engagement scores or good absence figures (presenteeism).

'In the past 3 months, have you ever not felt well enough to perform your duties to your normal standard, but attended work regardless?'

This question is suggested by Professor Sir Cary Cooper, as one which may indicate that people are attending work despite poor mental (or physical) health. Further information on this topic is available at 'Psychological well-being at work: Research evidence and current issues'

'Do you feel energised by your work?'

This question is based on the premise (supported by scientific evidence) that high levels of mental, physical and emotional wellbeing are characterised by a positive, high-energy state. Feeling energised by your work is therefore an indicator for how a person's experience of work is contributing to their mental, physical and emotional wellbeing.

Mind's Wellbeing Index

Mind, the charity which campaigns for better mental health, suggests considering some of the following topics for use in engagement and wellbeing surveys to assess the overall state of employee mental health ([Mind, Employers' Guide](#))

- Impact of mental health on ability to work, and vice versa
- Impact of work on colleague's mental wellbeing
- Support from the organisation for wellbeing of staff
- Support from managers and colleagues

In 2016 Mind launched the Workplace Wellbeing Index, enabling employers to celebrate the good work they're doing to promote staff mental wellbeing and get the support they need to be able to do this even better. The Index is a benchmark of best policy and practice and will robustly assess where the gaps lie between an organisation's approach and staff perceptions, as well as recognising the employers who are best supporting the mental health of their staff.

Taking part in Mind's Index will enable you as an employer to:

- Gain public recognition of your organisation's commitment to workplace wellbeing
- Learn where you benchmark in comparison to peers and other organisations participating in the Index
- Share and access best practice learning from other employers participating in the Index
- Be part of our movement for change in workplace mental health and a trailblazer in your sector
- Find out what your employees really feel about how you support their mental health

To learn more about the Index and register interest, please visit www.mind.org.uk/index.
Please note, this is a paid-for service.

Questions about mental health and wellbeing from the Workplace Employment Relations Study

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The Workplace Employment Relations Study 2011 carried out amongst employees across the UK on behalf of the Department for Business, Innovation and Skills, included a question that asked directly about depression, anxiety and other mental health states:

‘Thinking of the past few weeks, how much of the time has your job made you feel each of the following: tense, depressed, worried, gloomy, uneasy and miserable’

For each state, the response options were: all of the time, most of the time, some of the time, occasionally and never.

The advantage of including this question would be that it provides detailed information about how your employees have been feeling, and you can download the data tables that enable you to compare the responses in your organisation with sector averages.

The survey report and [full questionnaire are available on the government website](#). [The data tables are also available](#).

Measuring individual resilience

Individual resilience can be captured in many of the questions stated above, in relation to wellbeing and mental health.

You can also encourage your employees to measure their own resilience, for example through online tools and apps. If you offer resilience tools for employees, you or your external provider may be able to track data on how individuals report on their own resilience levels. I-resilience is a free, online, scientifically validated questionnaire which provides a comprehensive understanding of personal resilience and gives examples of how this could

impact on users’ responses to demanding work situations. The confidential, personal *i-resilience* report allows users to build on existing areas of strength, and also allows them to manage any potential areas of risk. Everyone has the ability to build and maintain their levels of resilience. The *i-resilience* portal then allows

users to develop their resilience in line with the results of their report.

The *i-resilience* report and online resources provide a set of integrated resilience tools that are completely free to use, by individuals across an entire organisation.

You can find out more on the [Robertson Cooper website](#).

GETTING STARTED WITH MEASURING EMPLOYEE ENGAGEMENT

Standard employee engagement questions

Business in the Community has produced Public Reporting Guidelines (see your wellbeing adviser for access) which detail metrics that align with each section of the first version of the Workwell Model, you can align your staff survey to these metrics. Surveys can either exclusively focus on health, wellbeing and engagement, or as part of a wider staff survey.

Measuring employee productivity

Public Health England produced a topic overview on [Measuring Employee Productivity in 2015](#). This gives an overview on the different ways in which productivity can be measured, with a focus on the link between wellbeing and productivity and presenteeism. These methods have also been evaluated and detail is given to how the measures can be applied across organisations and sectors.

Net Promoter Score (NPS) – a simple indicator based on just two questions

The CIPD Framework for Human Capital Measurement proposes using the Net Promoter Score as a simple indicator of employee engagement. It is used by some of Business in the Community's member companies, including Gentoo, the winners of Business in the Community's Bupa Workwell Employee Engagement and Wellbeing Award 2014.

The Employee Net Promoter Score (eNPS) is based on just two questions which could be easily incorporated into an annual staff survey or asked on a more regular basis:

'On a scale of zero to ten, how likely is it you would recommend this company as a place to work?'

'How likely would you be to recommend this company's products or services to a friend or colleague?'

NPS is calculated by subtracting the percentage of Detractors from the percentage of Promoters.

Promoters are those who respond with a score of 9 or 10 and are considered loyal enthusiasts. Detractors are those who respond with a score of 0 to 6 are considered unhappy employees. Scores of 7 and 8 are passives, and they will only count towards the total number of respondents, but not directly affect the formula.

The basic [eNPS question](#) can be combined with qualitative questions to help you to understand why employees have answered as they have.

For example:

1. Why did you give us that score?
2. What would it take to earn a 10?

If you choose to use eNPS, bear in mind that research shows that eNPS scores may be slightly higher than engagement scores derived using other questions. This is because employees might be prepared to recommend the company but not motivated to perform or perhaps plan on leaving because they believe it is a good place to build experience and connections for one or two years.

CONCLUSION

This measurement guide is for those organisations starting out on the journey to measure employee wellbeing. This three piece suite of measurement guides supports organisations at all stages of the journey, see the following two guides for an intermediate and mature approach:

- Guide 2: Deepening Your Insights
- Guide 3: Wellbeing Charters, Frameworks, Standards, and Benchmarks

For more guidance on measurement, discuss this with your dedicated adviser. Your adviser offers ongoing support and will help you to deliver a whole person approach to wellbeing, ensuring it is aligned to the Workwell Model and that wellbeing is fully integrated into your organisation.

We would also like to invite you to contribute a case study for the Wellbeing Campaign, please get in touch with your adviser if you are interested.

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