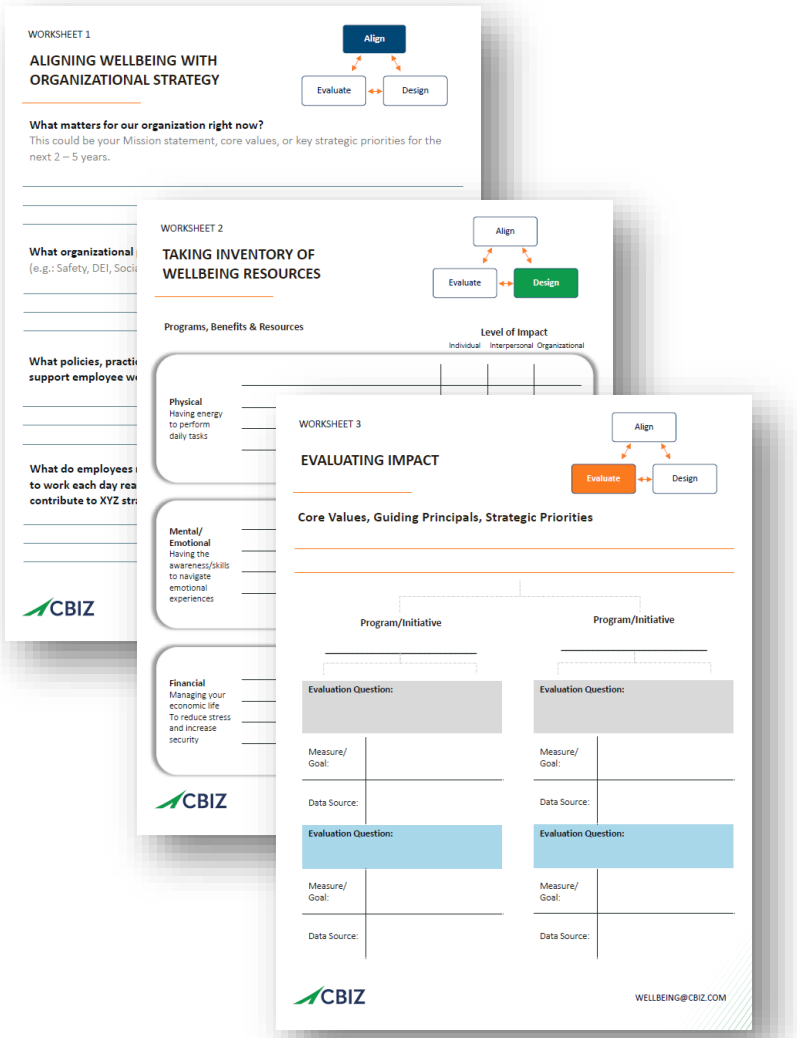
Creating and Implementing a Meaningful Employee Wellbeing Program

Align | Design | Evaluate

August 12, 2025

Anisa Karczynski, MPH
Senior Engagement & Wellbeing Consultant
CBIZ, Inc.



Scan the QR Code for Worksheets

Wellness vs. Wellbeing?

Wellness

- **Wellness** describes a healthy lifestyle
- **Wellness** refers to a state of physical health in which people have the ability and energy to do what they want to do in life without chronic suffering
- **Wellness** is an important element of overall wellbeing
- However, **wellness** is only one part of a thriving life

versus

Wellbeing

- **Wellbeing** encompasses the broader holistic dimensions of a well-lived life
- **Wellbeing** focuses on the whole person, addressing key areas that allow individuals to thrive
- **Holistic wellbeing** in the workplace includes population health management, organizational wellbeing, and employee wellbeing

CBIZ

Key Elements of a Wellbeing-Centered Workplace

Drives Business Success

Embedding wellbeing into culture attracts and retains top talent and boosts performance.

Supports All Employees

Holistic, inclusive programs foster a culture where everyone feels valued.

Creates Clarity and Purpose

Employees understand their roles and how their work advances organizational goals.

Boosts Engagement

Opportunities for growth and development inspire meaningful contributions.

Removes Barriers to Support

Clear, accessible resources encourage employees to seek help without stigma.

Promotes Balance

Flexibility and work-life integration improve wellbeing and productivity.

CBIZ

Agenda

Align employee wellbeing to what matters most to your organization

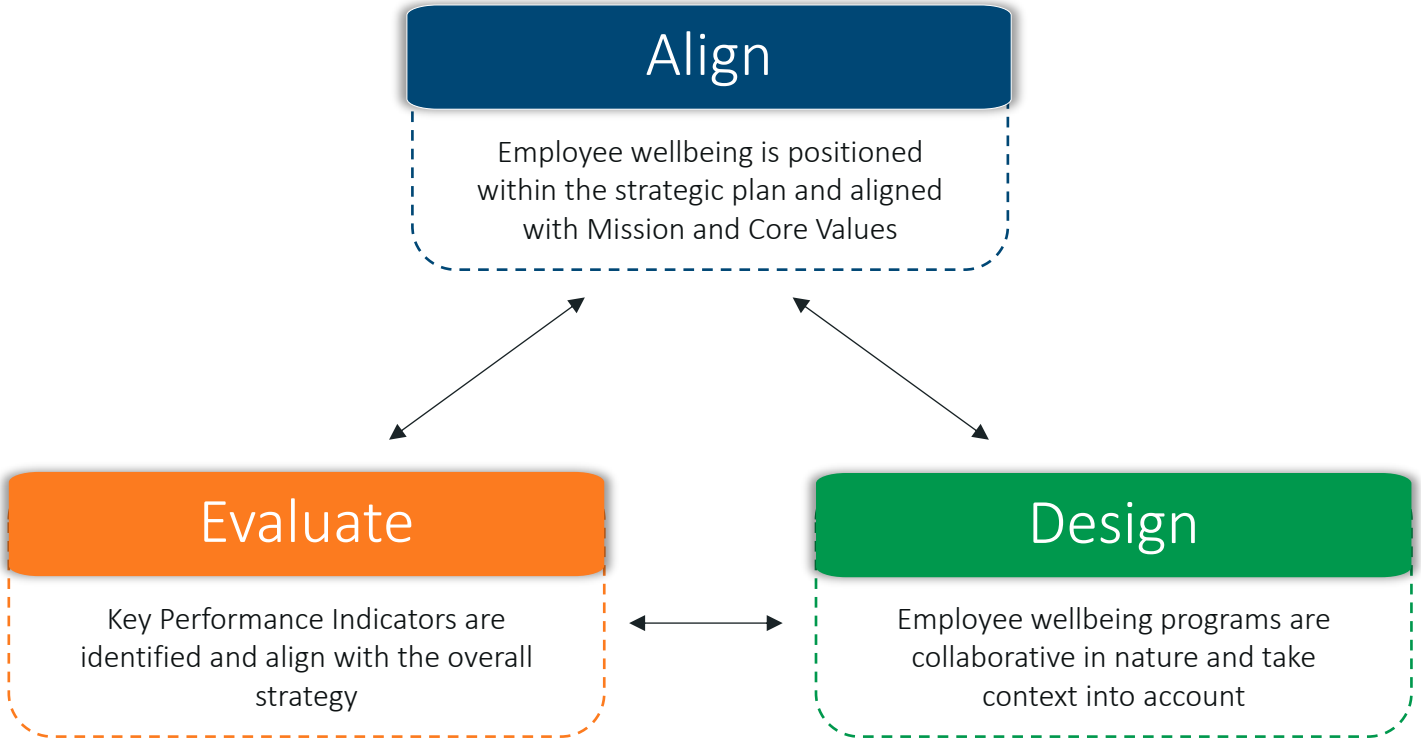
Design employee wellbeing programs that are collaborative in nature and take context into account

Evaluate wellbeing strategy with metrics that reflect top priorities

Takeaways

- Reflect on key questions for leaders to consider to ensure alignment
- Start an inventory of existing programming that reflects a whole-person, multi-context approach
- Contemplate metrics that may be appropriate/applicable based on goals

Pinnacle Points for Wellbeing Elevation



Align

...with what matters most to your organization



Whole-Person Approach to Wellbeing

"Wellbeing is about the combination of our love for what we do each day, the quality of our relationships, the security of our finances, the vibrancy of our physical health, and the pride we take in what we have contributed to our communities. Most importantly, it's about how these five elements interact."
- Tom Rath



Purpose

Liking what you do each day and being motivated to achieve your goals



Social

Having a strong sense of community at work as well as supportive relationships and love in your life



Financial

Effectively managing your economic life to reduce stress and increase security



Community

The sense of engagement and involvement you have with the area where you live



Physical & Emotional

Having good health and enough mental energy to get things that are important to you done each day

CBIZ

Impact of Employee Wellbeing

Employees thriving in the five areas of wellbeing are:



3x more likely to be engaged at work



71% less likely to experience burnout



69% less likely to seek out new employment



39% more likely to thrive in their overall lives

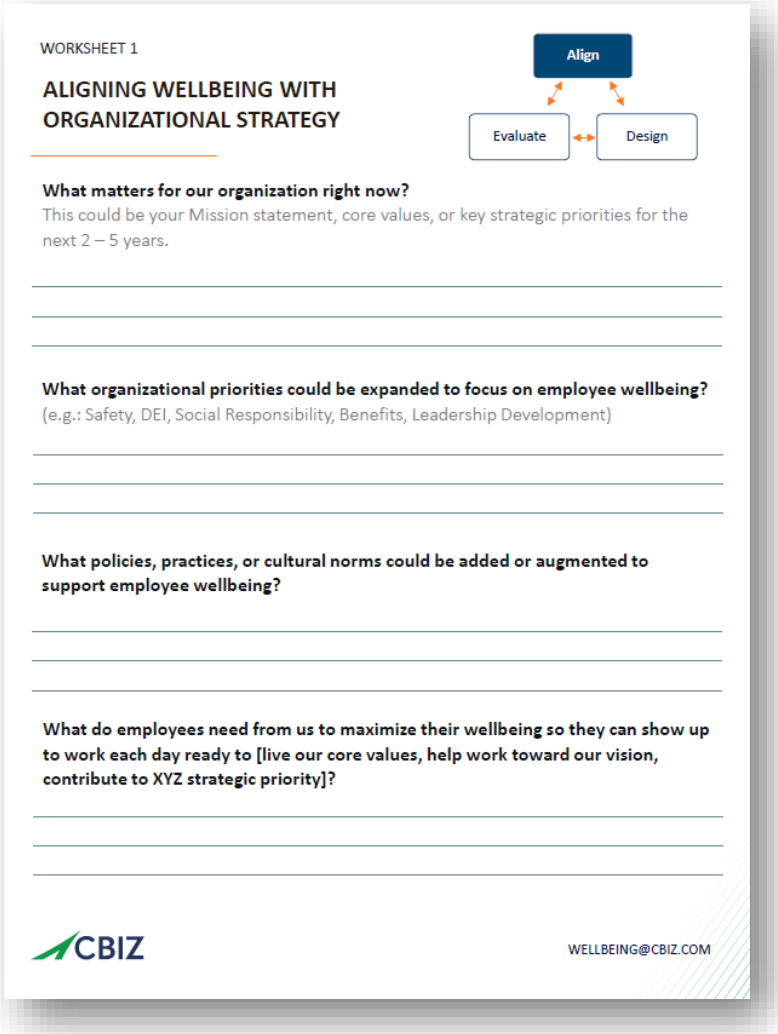
37% more likely to fully recover after illness

CBIZ

Sources: Gallup, 2021, Wellbeing at Work" & Gallup, 2022, The Wellbeing-Engagement Connection

Align Wellbeing with Strategic Priorities

- Vision
- Mission
- Core Values
- Guiding Principles for Total Rewards or Benefits
- Strategic Priorities



WORKSHEET 1

ALIGNING WELLBEING WITH ORGANIZATIONAL STRATEGY

What matters for our organization right now?
This could be your Mission statement, core values, or key strategic priorities for the next 2 – 5 years.

What organizational priorities could be expanded to focus on employee wellbeing?
(e.g.: Safety, DEI, Social Responsibility, Benefits, Leadership Development)

What policies, practices, or cultural norms could be added or augmented to support employee wellbeing?

What do employees need from us to maximize their wellbeing so they can show up to work each day ready to [live our core values, help work toward our vision, contribute to XYZ strategic priority]?

CBIZ

WELLBEING@CBIZ.COM

CBIZ

Next Steps



Collaborate

- Employee input
- Leadership buy-in
- Consider visioning session or short-term task force



Refine

- Vision for wellbeing
- Clear goals and key objectives



Prioritize

- Categorize quick wins versus heavier lifts
- Stay clear on what matters most right now

CBIZ

Design

...a multi-context approach that reflects what matters most to employees



Designing a Holistic Wellbeing Strategy



Organizational Commitment

Wellbeing is integral to business strategy. Commitment to a culture of wellbeing is evident and shared by leaders and managers across the organization.



Actionable Data

Data is gathered and analyzed to identify wellbeing risks, needs and resources. Data is used to make environmental changes, introduce new benefits and increase engagement.



Sustainable Culture

The built environment, physical work spaces, procedures, policies and engaged-employee champions support a culture of wellbeing and encourage healthy choices.



Wellbeing Programs, Benefits & Networks

Selection, design and delivery of programs and benefits address various aspects of wellbeing. Emphasis is on vendor/provider and employer collaboration, quality assurance and shared results.



Communication & Engagement Methods

Communications have a recognizable wellbeing brand. Marketing methods reach all segments of the population and engage employees and their families in meaningful ways.



Outcomes & Value of Investment

Analytical tools and benchmarks are used to evaluate the reach and impact of programs and practices and demonstrate the value of investing in wellbeing benefits.

Copyright © 2025 CBIZ Benefits & Insurance Services, Inc. All rights reserved.

Include Employees in the Process

- People support what they help create.
- *Workplace wellbeing is not only done FOR employees but WITH employees.*

PRESCRIPTIVE vs. COLLABORATIVE

Resistors and Saboteurs



Ambassadors and Enthusiasts



CBIZ

Assess Employee Needs & Interests

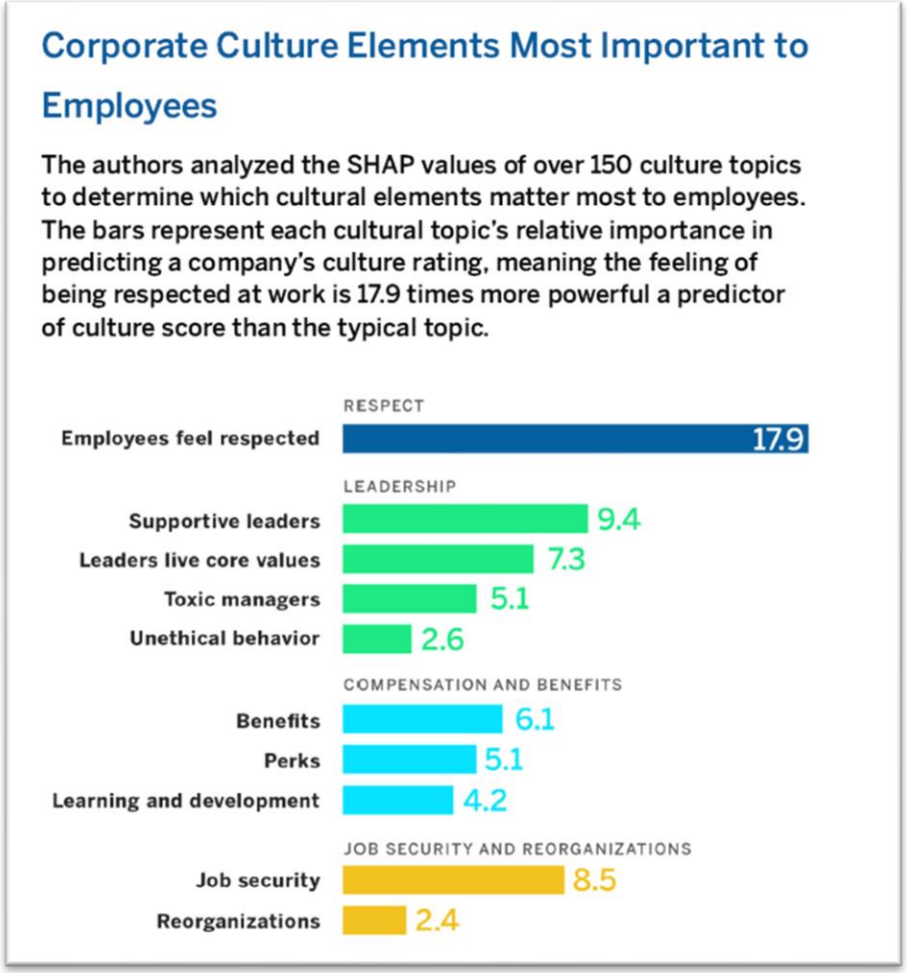
Methods

- Surveys
- Focus Groups
- Observation
- Behaviors



What Matters Most to Employees

- Employees Feel Respected
- Supportive Leaders
- Leaders Live Core Values
- Benefits & Perks



https://sloanreview.mit.edu/article/10-things-your-corporate-culture-needs-to-get-right/

Take Inventory



Purpose/Career

Finding meaning in your life, connecting value to what you do in your work.

- ERGs (young professionals, veterans, women, LGBTQIA+, parents, etc.)
- Education assistance/ tuition reimbursement
- EAP work-life services, career coaching
- Training/growth and development opportunities
- Volunteer program/policy
- Scholarships/professional development grants and awards
- Recognition programs
- Referral programs



Social

Having supportive relationships and a strong sense of belonging.

- ERGs (young professionals, veterans, women, LGBTQIA+, parents, etc.)
- Annual or ongoing events and activities for team building, employee appreciation, etc.
- Employee wellbeing programs and challenges
- Employer-sponsored sports teams or activity clubs
- Internal social pages/channels and message boards
- EAP coaching and therapy



Financial

Managing your economic life to reduce stress and increase security.

- Retirement plan
- Voluntary coverages
- Education assistance/ tuition reimbursement
- Wellness incentives
- Health Savings Account (HSA)
- EAP financial and legal resources
- Employee referral program
- Stock share, ESOP, etc.
- Discount center resources (carrier, EAP, or 3rd party partnership)
- Seminars and workshops
- Financial wellbeing vendor



Physical & Emotional

Having energy to perform daily tasks, and awareness/skills to navigate emotional experiences.

- Medical plan resources: virtual care, nurse line, provider locator, app features
- Disease management and condition care
- Tobacco cessation
- EAP
- Wellbeing vendors and programs
- Dental
- Vision



Community

Feeling safe and engaged in the area you live and taking pride in your community.

- EAP concierge and work-life resources
- Volunteer program/policy
- Community partnerships and discounts
- Employee wellbeing programs and challenges
- Employer-sponsored sports teams or activity clubs
- Internal social pages/channels and message boards

Take Inventory

Organizational

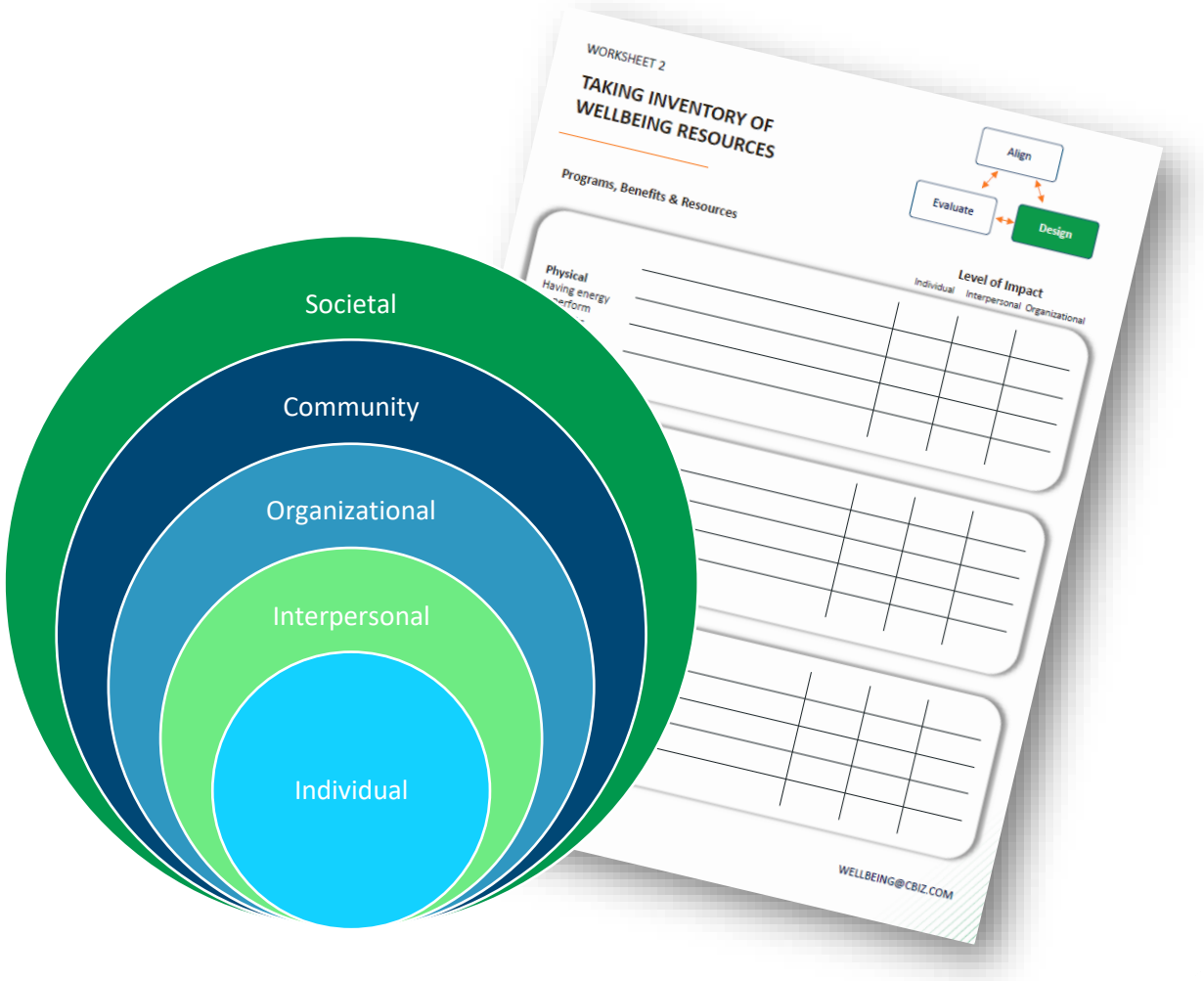
The physical work environment and workplace policies/procedures

Interpersonal

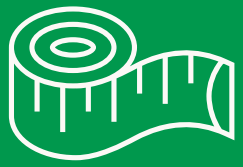
Social impact: programming that encourages interaction and teambuilding

Individual

Resources, education, and programs that impact employees on a personal level

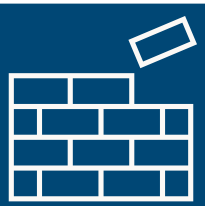


Next Steps



Assess

- Identify strengths and opportunities in current resources



Build

- Fill in gaps
- Grassroots vs. Vendors



Communicate

- Ensure employees are clear on what's available

CBIZ

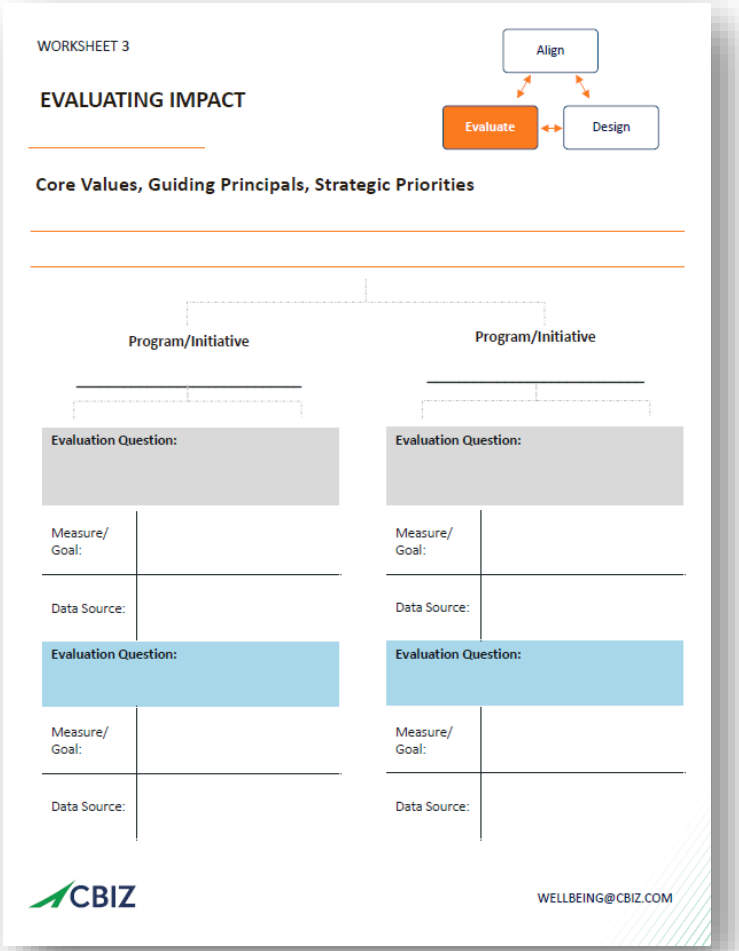
Evaluate

...thoughtfully, with metrics that reflect top priorities



Evaluating Impact

- What is the goal?
  - Specific
  - Measurable
  - Achievable
  - Relevant
  - Timeline
- What metrics would indicate success?
  - Evaluation questions
  - Impact vs. Outcomes
  - Workforce vs. Workplace
- What are your potential data sources and methods?



Metrics and Data Sources



Purpose/Career

Finding meaning in your life, connecting value to what you do in your work.

- Culture survey results
- Engagement survey results
- Employee referrals
- eNPS
- Job mobility within the organization
- Turnover
- Participation in training and development
- Participation in mentorship programs
- Interaction with company social media (re-shares, etc.)
- Participation in workplace awards and recognition programs



Social

Having supportive relationships and a strong sense of belonging.

- Participation in ERGs, company events, mentorship programs
- Culture survey results
- Engagement survey results
- Engagement with company social or wellbeing newsletters, social media accounts, collaboration channels, etc.
- Utilization of collaborative workspaces
- Participation in workplace awards and recognition programs



Financial

Managing your economic life to reduce stress and increase security.

- Participation in retirement plans and average percentage contributed
- Percentage taking advantage of full 401(k) match
- Number of loans or early withdrawals from the plan
- Participation in financial wellbeing seminars or services
- Utilization of financial resources via EAP
- Average HSA balance



Physical & Emotional

Having energy to perform daily tasks, and awareness/skills to navigate emotional experiences.

- Lifestyle-related medical claims
- Average sick days
- Musculoskeletal workers' comp claims
- Participation in workplace wellbeing challenges, trainings, and seminars
- Utilization of water bottle fillers, purchase of healthy vs. unhealthy snacks
- Wellbeing survey results
- Safety incidents
- Preventive care utilization
- Gaps in care



Community

Feeling safe and engaged in the area you live and taking pride in your community.

- Mental health-related medical and disability claims
- Unused PTO
- Antidepressant and anti-anxiety prescription rates
- Job mobility within the organization
- eNPS
- Culture survey results
- Engagement survey results
- Wellbeing survey results
- Safety incidents
- EAP utilization rates

Evaluation Examples

Evaluation Questions	Measures/Goals	Data Sources	Timeline
Awareness & Reach To what extent are employees aware of the wellbeing program and its offerings?	• ≥80% of employees can name at least one program component or resource	Employee surveys, pulse polls	Annually
Engagement & Participation Are employees participating at desired levels across different departments, shifts, and locations?	• ≥30–50% participation rate overall • Representation proportional to workforce demographics	Registration/ attendance logs, HR demographic data	Quarterly
Accessibility & Barriers Have barriers such as scheduling, location, cost, or stigma been reduced?	• ≥75% agree program times/locations are convenient • Decrease in % citing cost, time, or stigma as barriers	Post-event feedback surveys, annual wellbeing survey	Semi-annually
Perceived Value Do employees view the wellbeing program as a valuable benefit?	• ≥75% agree program is valuable to their health/wellbeing • Positive Employer Net Promoter Score (eNPS ≥+30)	Annual engagement/ wellbeing survey, post-event surveys	Annually
Outcomes & Impact Is the program contributing to improved wellbeing, job satisfaction, or retention?	• Positive self-reported changes in wellbeing or work-life balance • Higher retention among participants	Pre/post program surveys, HR retention data	Annually
Population Health Is the program improving overall employee health indicators and reducing health risks?	• Year-over-year improvement in health risk assessment results (e.g., reduced tobacco use, improved BMI, lower blood pressure) • Decrease in preventable chronic condition prevalence	Aggregate health risk assessment data, claims/ utilization data	Annually

Workplace Awards

- Healthy Arizona Worksites Program (HAWP)
- Healthiest Employers
- Great Place to Work Designation
- WELCOA Well Workplace Award
- Gallup Exceptional Workplace Award
- Mental Health America Bell Seal Award
- The Health Project Koop Award
- Medical Carrier-Sponsored Awards



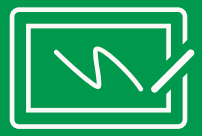






CBIZ

Next Steps



Define

- Key Performance Indicators that are in line with your goals



Track

- Determine data sources and timing



Share

- Inform employees of strategic adjustments
- Communicate success

Communication Is KEY



Builds alignment and trust



Improves engagement and adoption



Supports continuous improvement



Encourages employee voice



Promotes transparency and inclusivity

Communication Best Practices

- Build a communication strategy
- Create simple, clear messaging
- Use multiple channels
- Leverage leadership and manager voices
- Make it interactive
- Highlight real stories

Compliance Considerations for Wellbeing Programs

- **Be aware of regulations around incentives** – Follow ACA/EEOC rules and offer alternatives for health-based goals.
- **Consider state/local laws** – Check for additional rules based on your location.
- **Protect employee privacy** – Safeguard health data (HIPAA), avoid sharing personal info, and refrain from collecting genetic or family medical history (GINA).
- **Ensure voluntary participation** – Programs should be optional and inclusive, not tied to job benefits.
- **Make programs accessible** – Accommodate disabilities and ensure equal access (ADA).
- **Vet vendors carefully** – Choose partners who understand and follow compliance standards.
- **Communicate clearly** – Be transparent about how programs work and how data is used.

Summary

Align employee wellbeing to what matters most to your organization

- ❑ Reflect on key questions for leaders to consider to ensure alignment

Design employee wellbeing programs that are collaborative in nature and take context into account

- ❑ Start an inventory of existing programming that reflects a whole-person, multi-context approach

Evaluate wellbeing strategy with metrics that reflect top priorities

- ❑ Contemplate metrics that may be appropriate/applicable based on goals

For more information contact:

Anisa Karczynski

Senior Engagement & Wellbeing Consultant

CBIZ, Inc.

anisa.karczynski@cbiz.com



CBIZ Copyright © 2025 CBIZ Benefits & Insurance Services, Inc. All rights reserved.