



## Case Study August 2012

# Wellness Metrics in Action The Williamson Group: An Organizational Culture of Caring

**E**stablished in 1976, The Williamson Group (TWG) is a family-owned financial services firm based in Brantford, Ontario.<sup>1</sup> Founded by Paul Williamson, TWG provides group benefits and pension consulting for more than 300 corporate clients across Canada. With 72 employees, TWG has a strong culture of caring for clients, colleagues, and communities.<sup>2</sup>

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1 This case study is based on information from Noel MacKay (Group Practice Leader, Group Benefits Consulting, TWG). Interview by Crystal Hoganson and Louise Chénier, February 24, 2012.

2 The Williamson Group, *About TWG*.

### HEALTH AND WELLNESS FOCUS

The health and wellness of TWG's employees has always been a part of the organizational culture. However, after seeing its clients' benefits costs rising and noticing its own recruitment challenges, the company realized that it needed to focus more closely on the health and well-being of its own workforce.

Although there was no official program launch, in 2005 the company formally branded its existing wellness initiatives as a "wellness program." Employees talked among themselves to determine their needs, then took their feedback and ideas to senior management for review.

### About This Series

The Conference Board of Canada recently published a report, *Making the Business Case for Investments in Workplace Health and Wellness*,<sup>1</sup> that provides small, medium-sized, and large organizations with advice on how to measure the impact of their workplace health and wellness programs. The report identifies practical, research-backed approaches to measurement, as well as a variety of tools and metrics, that employers can use to demonstrate the return on investment of their health and wellness initiatives.

Research for the report, which included an in-depth review of the literature, identified several employers that are currently evaluating the impact of wellness programs on their organizations. These leaders have invaluable information and guidance to offer to other employers that are trying to measure the impact of their own health and wellness initiatives. This briefing is the fifth in a series of case studies that profile these organizations, their wellness programs, and the methods they use to evaluate their initiatives.

1 Chénier, Hoganson, and Thorpe, *Making the Business Case for Investments in Workplace Health and Wellness*.

TWG’s wellness program focuses on healthy eating and activity. It started with small initiatives, such as “Fibre Fridays” (fruit and vegetable trays placed around the office) and a pedometer challenge (biggest mileage recorded wins a prize). Eventually, it incorporated more initiatives including lunch-time Pilates classes, running groups, massage therapy, and community volunteering programs.

*Wellness is a culture, not a product.*

—Noel MacKay, Group Practice Leader,  
Group Benefits Consulting, TWG

## MEASUREMENT, EVALUATION, AND RETURN ON INVESTMENT

TWG believes that if employees are healthy, they are more productive in everything they do—in the workplace, in their personal lives, and in the community.

TWG is very invested in corporate social responsibility, and it is clear that this philosophy has carried over to its employees. For 13 years, there has been 100 per cent participation in the local United Way fundraising event, and in 2010 alone TWG staff collected over 20,000 pounds of food for Brantford’s local food bank—far more than employees of any other employer.

TWG does not calculate return on investment and is not concerned with the “hard” numbers. Rather, it is more interested in feedback from employees. As a small business, it is close to its staff. Senior management is able to walk around the office and have casual conversations about the impact and effectiveness of the wellness program. Along with collecting feedback and anecdotes—many of them inspirational (e.g., one employee ran her first five-kilometre race last year)—the company looks at the biometric data gathered before and after a challenge, such as a pedometer challenge. Not only does TWG have a high employee retention rate, but it also has high participation rates in wellness events and high employee engagement scores.

In the future, TWG intends to focus more closely on other program outcomes. Specifically, it wants to explore the impact of the wellness initiatives on casual absences, short- and long-term disability claims, and drug spending.

*A common framework or measurement tool would be very useful. But first you need to have a common “wellness” definition, get people to measure consistently, and then build a database to benchmark [against].*

—Noel MacKay, Group Practice Leader,  
Group Benefits Consulting, TWG

## CHALLENGES

One of the biggest challenges for TWG has been determining whether its wellness program is actually causing drug spending to decrease. As patents on brand-name drugs expire and cheaper, generic forms come onto the market, companies such as TWG may see drug costs decline independently of investments in wellness. Other measurement challenges have arisen in trying to measure productivity, since the company operates in the services sector.

TWG has also found itself challenged to find staff to administer wellness programming. Human resources departments are getting smaller and demands are changing. Whoever is responsible for overseeing the programming must have the time to do the job properly.

## ADVICE FOR OTHERS

TWG advises that organizations should not be afraid to implement wellness programs. Rather, they should start small, taking things one step at a time. TWG sees wellness programs as an evolutionary process whereby the program is built up gradually over time. Mistakes will be made, but as long as an organization overcomes these challenges, perseveres, and keeps the program fresh, the program should be successful and sustainable.

TWG also recommends looking outside the organization for best practices and assistance. For instance, TWG turned to its benefits provider, Sun Life Financial, which was able to suggest different programs and resources to enhance TWG's health and wellness program.

Finally, TWG notes that support from senior leaders and motivating employees are critical. It suggests finding an employee in the organization who is willing to be a wellness champion to motivate and engage others.

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## The Williamson Group: An Organizational Culture of Caring by Crystal Hoganson

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