Mental Health Awareness at Work:
Evaluate Your Program to Make a Lasting Impact

Organizations have spent years improving, refining or implementing mental health programs as a way to take care of their employees' emotional wellbeing. As employers look back on those initiatives, the impact and measurement of the programs can be a daunting task. There isn't a one-size-fits-all approach.

The key component to measuring and evaluating your mental health strategy is data. Using carefully selected data and deciding organizational priorities allow you to quantify your objectives. This helps determine if the solutions put in place are working, which allows you to make adjustments and optimize as time goes on. The exercise below can help HR leaders take action today when it comes to evaluating their mental health program.

Starting (or Restarting) on a Path to Better Wellbeing

1. **TRACK:** Identify your success by using Gallagher's **Mental Health Key Performance Indicator (KPI) Checklist** below and evaluate quarterly.

2. **REFLECT:** What programs are currently in place and are they effective? Do you know what your employees actually want from their mental health program?

3. **INCORPORATE:** Do you have data from a few years ago? Incorporate that data into this exercise and see if you can find trends.

4. **IMPROVE:** Work towards continuous evaluations to meet the needs of your people.

Employer Tips

• Start small and progress as data becomes available. It may be difficult to incorporate all the data points at first, so start with what you have today and decide where you want to go.

• Utilize national marketing campaigns (Mental Health Month, Employee Wellbeing Month, Pride Month etc.) that connect to your company's social responsibility and commitment to employee health.

• Behavioral change comes when employees are part of the process. Getting their input will help break stigmas around mental health.

• Consider looking at some of the relevant data identified in the checklist on the next page. Review each category (Business unit, job function, location etc.), to fully understand your high-risk areas and where change will make the most impact.

• Your organization's KPIs will evolve over time, so it's important to understand this is a journey. Most research indicates it can take 3-5 years to see a positive ROI. The key to success will be an ongoing effort with multiple iterations. Progress comes in many forms.

Use the following checklist to help guide your organization on what to consider when it comes to mental health programs. Items in **orange** **are examples of how to track and use this tool.**

Mental Health Key Performance Indicator (KPI) Checklist

Mental Health KPI Measurements	Workplace Mental Health Assessments			
Leadership Commitment	In Place	Metric	Planned	Next Steps
Employee Survey/Focus Group Related to Leadership				
Written Organizational Mental Health Vision/Strategy	**x**			**Strategize/design**
Naming of an Executive Sponsor for Mental Health Strategy				
Track % of Leaders Trained to Support Mental Health of Employees				
Workplace Risk Factors	In Place	Metric	Planned	Next Steps
Employee Survey/Focus Group Related to Mental Health in the Workplace				
Employee Engagement Survey Results (Overall Metrics)				
Track Employee Mental Health Training and Development Participation Rates				
Evaluate Total Sick Days Taken	**x**	**Tracked by HR**		**Breakdown by BU in Dec. 2023**
Evaluate Overall Vacation Time and Accrued Time Off				
Health and Safety Metrics	In Place	Metric	Planned	Next Steps
Respectful Workplace Incidents				
Grievances (escalated concerns)				
Ethics Violations				
Workplace Safety Report (Near Misses)			**x – Q2**	**Formalize safety reporting**
Short/Long-Term Disability	In Place	Metric	Planned	Next Steps
Average Claim Duration Mental Health	**x**	**Avg STD case is 27 days**		**Reduce goal to 23 days by 2024**
New Mental Health Related Claims				
Relapse Rate				
Incidence Rate				
Return to Work - Success Rates				
Benefits	In Place	Metric	Planned	Next Steps
Utilization Rates or Total Costs for all Mental Health Services (Psychology benefit)				
Total Drug Cost for Mental Health Conditions				
Percentage of Total Benefit Costs Related to Mental Health				
EAP Utilization Rate / EAP Costs / EAP Cases-Mental Health				
Other Internal Reporting	In Place	Metric	Planned	Next Steps
Formalized Employee Performance Reviews and Feedback				
Employee Recruitment/Retention Success Metrics				
Exit Interview Data (Key Theme Analysis)				
Customer Satisfaction (Complaints) Public Image Analysis				
Employee Turnover Rates (By Business Unit)	**x**	**Avg tenure 4.4 years**		**Increase tenure to 5 years**

Contact your Gallagher consultant today to discuss your organization's absence and productivity or emotional wellbeing strategy.

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