**Organizational Metrics**

1. **Summary**

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| **Summary Organizational Metrics** | | |
|  | | |
| **Number of Employees:** | | |
|  | | |
| **Health Care Costs:** | | |
|  | | |
| **Impact on Productivity:** |  |  |
|  | **Mean Annual Unproductive Days:** | **Presenteeism Costs:** |
| **Mean Annual Absence Days:** | **Absenteeism Costs:** |

1. **Health Care Costs**

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| --- | --- | --- | --- |
| **Health Care Costs** | | | |
|  | | | |
| **Number of Employees:** | |  | |
| Average Daily Compensation @ company for Full-Time Employee: | |  | |
| Total Daily Compensation @ Company: | |  | |
|  | | | |
| **Health Care costs** |  | | |
|  | Medical care cost |  |  |
| Pharmaceutical care cost |  |  |
| Utilization costs (from claims analysis) |  |  |
| Disability cost |  |  |
| Workers’ compensation cost |  |  |
| Overall health care cost |  |  |
|  | | | |
| **Impact on Productivity** |  | | |
|  | Presenteeism Rate: |  |  |
| Mean annual unproductive days: |  |  |
| Presenteeism Cost: |  |  |
|  |  |  |
| Absenteeism Rate: |  |  |
| Mean annual absence days: |  |  |
| Absenteeism Cost: |  |  |
|  | | | |
| **Productivity Cost** |  | | |
|  | | | |
| **Tulasi Implementation Cost** | ??????????????????????????????????????????????????????????????? | | |
|  | | | |
| **Return on Investment (ROI)** | ???????????????????????????????????????????????????????????????????? | | |

1. **Impact on Productivity**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Annual Impact on Productivity by Health Risk Levels** | | | | | | | | |
| **Risk Levels** | **Number of Employees** | **% employees with risk(s)** |  | **% Absenteeism Rate** | **% Presenteeism Rate** |  | **Absenteeism Costs** | **Presenteeism Costs** |
| **0 Risk Ideal/Excellent** |  |  |  |  |  |  |
| **1 Risk**  **Doing well/Low risk** |  |  |  |  |  |  |
| **2 Risks**  **Needs Improving/At Risk** |  |  |  |  |  |  |
| **3 + Risks Caution/At High Risk** |  |  |  |  |  |  |

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| **Annual Productivity Loss by Number of Health Risk Level** | | | | |
| **Risk factors** | **Mean Annual Absent Days** | **Mean Annual Unproductive Days** | **Total Annual% Productivity Loss** | **Total Annual Productivity Costs** |
| **0 Risk Ideal/Excellent** |  |  |  |  |
| **1 Risk**  **Doing well/Low risk** |  |  |  |  |
| **2 Risks**  **Needs Improving/At Risk** |  |  |  |  |
| **3 + Risks Caution/At High Risk** |  |  |  |  |

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| **Annual Productivity Loss by Number of Health Risks (Excess Health claims costs)** | | | | | | | | | |
| **Risk factors** | **Number of Employees – (% val)** | **% Absenteeism** | **% Presenteeism** |  | **Annual Absenteeism Costs** | **Annual Presenteeism Costs** |  | **Total % Impact on Productivity** | **Total Annual Productivity Loss** |
| **Alcohol use (>14 drinks per wk** |  |  |  |  |  |  |  |
| **High Blood Pressure (>140/90 or current medication(s) use** |  |  |  |  |  |  |  |
| **Body Weight** |  |  |  |  |  |  |  |
| **Cholesterol** |  |  |  |  |  |  |  |
| **Low HDL (<40mg/dl)** |  |  |  |  |  |  |  |  |  |
| **Existing Chronic Medical Conditions** |  |  |  |  |  |  |  |  |  |
| **Illness Days** |  |  |  |  |  |  |  |  |  |
| **Job Satisfaction** |  |  |  |  |  |  |  |  |  |
| **Medication/Drug for Relaxation** |  |  |  |  |  |  |  |  |  |
| **Perceived Health** |  |  |  |  |  |  |  |  |  |
| **Physical Activity** |  |  |  |  |  |  |  |  |  |
| **Safety Belt** |  |  |  |  |  |  |  |  |  |
| **Currently Smoking** |  |  |  |  |  |  |  |  |  |
| **Stress** |  |  |  |  |  |  |  |  |  |

**Annual Productivity Loss by Number of Health Condition and Risks**

The binary variable algorithm could be used again to determine the productivity loss by specific health condition and health risks. Table 5 is a suggestive format illustrating the cost impact of health risk.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Annual Productivity Loss by Number of Health Risks** | | | | | | | | | |
| **Risk factors** | **Number of Employees** | **% Absenteeism** | **% Presenteeism** |  | **Annual Absenteeism Costs** | **Annual Presenteeism Costs** |  | **Total % Impact on Productivity** | **Total Annual Productivity Loss** |
| **Risk A** |  |  |  |  |  |  |  |
| **Risk B** |  |  |  |  |  |  |  |
| **Risk C** |  |  |  |  |  |  |  |
| **Risk X** |  |  |  |  |  |  |  |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Annual Productivity Loss by Number of Health Conditions** | | | | | | | | | |
| **Conditions** | **Number of Employees - (%)** | **% Absenteeism** | **% Presenteeism** |  | **Annual Absenteeism Costs** | **Annual Presenteeism Costs** |  | **Total % Impact on Productivity** | **Total Annual Productivity Loss** |
| **Condition A** |  |  |  |  |  |  |  |
| **Condition B** |  |  |  |  |  |  |  |
| **Condition C** |  |  |  |  |  |  |  |
| **Condition X** |  |  |  |  |  |  |  |

Method 1: presenteeism & absenteeism (from HRA questionnaire)

We shall determine from an analysis of HRA the following:

1. Number of employees with Risk A, B, C….X
2. Number of employees with Condition A, B, C….X
3. Mean Absenteeism Rate for Risk A, B, C…X
4. Mean Presenteeism Rate for Condition A, B, C….X

Consequently,

1. All respondents with assigned value of “1”within each ‘Condition’ and ‘Risk’ are added up to determine the total number of respondents with ‘Condition A, B, C…X’ and ‘Risk A, B, C…X’.
2. The corresponding value of ‘Absenteeism’ and ‘Presenteeism’ per respondent within each condition and risk is totaled.

Absenteeism Rate = (Total Absenteeism values) / (Number of people with condition or risk).

Presenteeism Rate = (Total Presenteeism values) / (Number of people with condition or risk).

**Calculating the Costs of Absenteeism and Presenteeism for a given company**

The generic formula to calculate the lost productivity is:

Cost = [% of work lost to risk factor(s) (A) and/or (B)] x [# of at-risk employees 1] x [(Average hourly Daily Compensation\_Full-time) x (8) x (240)]

More specifically, the formula is adapted to calculate the productivity lost given a specific condition or risks factors:

Cost\_Abst\_Risk\_X = [(Absenteeism rate for Risk X) x (# of employees with Risk X)] x [(Average hourly Daily Compensation\_Full-time) x (8) x (240)]

Cost\_Prest\_Risk\_X = [(Presenteeism rate for Risk X) x (# of employees with Risk X)] x [(Average hourly Daily Compensation\_Full-time) x (8) x (240)]

Cost\_Abst\_Condition\_X = [(Absenteeism rate for condition X) x (# of employees with Risk X)] x [(Average hourly Daily Compensation\_Full-time) x (8) x (240)]

Cost\_Prest\_Risk\_X = [Presenteeism rate for Condition X) x (# of employees with Risk X)] x [(Average hourly Daily Compensation\_Full-time) x (8) x (240)]

Health costs = sum of the following costs

1. Medical care costs
2. Pharmaceutical care cost
3. Utilization costs (from claims analysis)
4. Disability costs
5. Workers’ compensation costs

Notes: All items 1, 2, 3, 4 and 5 are input field from company

Method 2: presenteeism & absenteeism (from HRA questionnaire)

Presenteeism rate:

Absolute presenteeism scoring rule: 10xB11

Relative presenteeism scoring rule: B11/B9 (restricted to the range of 0.25 to 2.0)

Absenteeism rate:

a) Using 4-Week Estimates

Absolute absenteeism: 4xB4 – B6

Relative absenteeism: (4xB4 – B6) / (4xB4)

Relative hours of work: B6 / (4xB4)

b) Using 7-day Estimates

Absolute absenteeism: 4xB4 – 4xB3

Relative absenteeism: (4xB4 – 4xB3)/4xB4

Relative hours of work: B3/B4

Note: calculations from file ‘Absenteeism Presenteeism scoring’

Presenteeism costs:

Absenteeism costs:

1. **Organizational culture**
2. **Job Satisfaction**

* Very satisfied at work
* Mostly satisfied at work
* Somewhat satisfied at work
* Not happy at work

|  |  |  |
| --- | --- | --- |
| **Job Satisfaction** | **#** | **%** |
| **Very satisfied at work** |  |  |
| **Mostly satisfied at work** |  |  |
| **Somewhat satisfied at work** |  |  |
| **Not happy at work** |  |  |
|  |  |  |
|  | **View Chart (pie chart)** | |
|  | | |

1. **Health and Wellness Interests**

* Fitness/Group fitness Yes/No
* Walking group (yes/No)
* Healthy Back (yes/No)
* Nutrition coaching
* Weight Loss/Weight management
* Cholesterol reduction
* Diabetes education/prevention
* Blood Pressure management
* Medical Self-care
* Counseling
* Smoking cessation
* Other (“write-in”)

|  |  |  |
| --- | --- | --- |
| **Health & Wellness programs to prioritize: (sample)** | **#** | **%** |
| **Fitness/Group fitness** |  |  |
| **Nutrition coaching** |  |  |
| **Weight Loss/Weight management** |  |  |
| **Diabetes education/prevention** |  |  |
| **Blood Pressure management** |  |  |
|  | **View Chart** | |
|  | | |

1. **Health and Wellness Culture**

Rate your organization overall wellness program(s)

* Excellent
* Good
* Fair
* Poor

|  |  |  |
| --- | --- | --- |
| **Health & Wellness Culture viewed as:** | **#** | **%** |
| **Excellent** |  |  |
| **Good** |  |  |
| **Fair** |  |  |
| **Poor** |  |  |
|  |  |  |
|  | **View Chart (pie chart)** | |
|  | | |