



FROM INSIGHTS TO ACTION

Leveraging Assessments to Fuel
Workplace Mental Health



IN COLLABORATION WITH



With Insider Insights from:



Pattie Gould

Global Head of Total Rewards
Citi Group



Jason Morgan

Global Health & Wellbeing Lead
Splunk

To hear their full stories, check out a recording of the **Workplace Mental Health Action Summit 2.0**.

From mapping out your journey to sharing your story of success, workplace mental health assessments can be a powerful tool to identify and strategically address mental health needs at your company.

This step-by-step guide helps human resource managers and corporate wellness teams create an assessment strategy that informs impactful company action.

STEP 1: Define Metrics that Matter

Identify or create an assessment tool that works for your organization by defining metrics that matter. This ensures the data collected tells a story and can be used for actionable insights.

STEP 2: Create Your Path to Results

Develop a data collection plan that works for your company.

STEP 3: Uphold Essential Ethics.

Protect the rights of your workforce and prioritize safety and confidentiality.

STEP 4: Transform Insights into Action

Use results from your assessments to inform and refine your company's mental health strategy.

STEP 5: Share Your Success

Communicate your achievements and progress with company leadership, your workforce and the broader public.

Building Buy-In from the Beginning

Before conducting a mental health assessment, communicate your intentions with company leadership to solicit their input and support. Use the Business Case from the **Workplace Mental Health Action Playbook** to communicate the value of investing in mental health initiatives. Demonstrate ways you can use data from company assessments to proactively identify mental health needs and target evidence-based solutions. Consider piloting an assessment with a small group to build momentum for a larger-scale effort.





[Existing] data will inform you pretty quickly that this is an area that you have to focus on. Seeing the productivity of your workforce, measuring things like attrition and even your healthcare claims. I would use the metrics that you have at your disposal to really inform leadership and get them on board.

Pattie Gould

Global Head of Total Rewards, CitiGroup

STEP 1: Define Metrics that Matter.

Start by defining your assessment strategy with the end goals in mind, focusing on metrics that inform actionable results. Consider your program goals and objectives, and what data you will need to demonstrate you've achieved these. Identify data that will help you communicate a return on investment.

When applicable, prioritize validated instruments that can benchmark your results over time or against other organizations.



Don't run an assessment for the sake of running it. Know what you want to do with the data. You want it to tell a story and be actionable.

Jason Morgan

Global Health and Wellbeing Lead, Splunk

Ultimately, you should design assessments to examine:

- **Company culture.** Your company culture can have an **outsized impact** on the health and well-being of your workforce. Get a pulse on your employee's perception of company culture by measuring satisfaction and perceptions of job demands, social support and **psychological safety** in the workplace. Incorporate these findings with other data sources such as retention rates, manager training evaluations and metrics on **diversity, equity, inclusion and belonging** as they relate to mental health and well-being.

- **Employee mental health and well-being.** You can get a direct measurement of your workforce's mental health needs by conducting mental health screening questionnaires on common mental health concerns such as depression, anxiety, stress and burnout. You can also analyze existing data on absenteeism, worker productivity, employee health reports and accommodation requests.
 - **Splunk** worked with **experts in performance psychology** to develop an innovative assessment tool that tracks employee "energy" across five dimensions of well-being: purpose, emotional, mental, physical and financial.



It really paints a unique picture about the whole person. So we want to be able to look at this and say, we don't want people to just feel good. We want them to be able to thrive.

Jason Morgan

Global Health and Wellbeing Lead, Splunk

- **Program efficacy.** Gain a comprehensive understanding of what's working, what isn't working and why or why not by analyzing service utilization reports, program participation rates, manager and employee training scores and employee feedback.
- ★ **Employee feedback and input.** Eengaging your employees for input on company decisions will make your programs more effective, increase buy-in and contribute to immediate and **direct impact** on mental well-being.



[At Citi Group] our CEO has 'Ask Me Anything' almost every quarter, so employees get a chance to ask the CEO what's on her mind.

Pattie Gould

Global Head of Total Rewards, CitiGroup



STEP 2: Create Your Path to Results.

There are a **number of ways** you can collect data for assessment and evaluation of your workforce, company culture and workplace mental health initiatives.

- Conduct anonymous online or in-person surveys.
- Host formal focus group conversations, informal team meetings or one-on-one interviews.
- Analyze existing data sources, such as absenteeism, productivity indicators or employee health records.
- Evaluate usage and efficacy of your mental health initiatives.

★ **Incorporate employee input throughout the identification, design and implementation of your mental health efforts.**



Listen to your people. You might have a strategy in mind, but their feedback and struggles may change your strategy.

Jason Morgan

Global Health and Wellbeing Lead, Splunk

STEP 3: Uphold Essential Ethics.

When collecting data on workplace mental health, it is **critical to safeguard** the rights, safety and confidentiality of your workforce.

- Emphasize a culture of caring and open communication about workplace mental health to alleviate concerns about stigma or perceptions of job performance.
- Be transparent about the purpose of your assessment. Describe how data will be collected, protected and used to inform company decisions on workplace mental health.



If you don't have transparency and accountability around [what you are measuring], then your programs are only going to go so far.

Pattie Gould

Global Head of Total Rewards, CitiGroup

- Ensure the privacy and confidentiality of employee feedback or survey submissions. Appoint a neutral survey administrator to collect and analyze results. You may consider hiring a third party vendor. Supervisors should never be responsible for collecting information.
- Obtain informed consent from your employees to collect and use the information they share in surveys or focus groups.
- Anonymize or de-identify data collection wherever possible. Smaller organizations may need to refrain from collecting demographic data that could make an employee's response identifiable. Similarly, avoid reporting on results by groups that are smaller than 25 members, such as making comparisons between small teams or departments.
- Share results with your workforce, along with a plan to address any identified areas of need.

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Our messaging really does sit with managers, and so we make it easily accessible and part of a toolkit that managers use to read out the results and understand where they want to focus on with their team.

Pattie Gould

Global Head of Total Rewards, CitiGroup

STEP 4: Transform Insights to Action.

Workplace mental health initiatives are not one size fits all. By using data to inform your institution's priorities, you can hone in on what types of interventions will make the greatest impact specifically for your workforce.

- **Connect employees who are struggling with supportive services.** Incorporating worker mental health screenings into assessments can help identify employees who are struggling and who could benefit from supportive services. You can help bridge access to supportive care by including direct links and phone numbers to services on surveys evaluating employee mental health or by sharing resources following a focus group conversation. Some assessment services, such as the **Healthy Work Survey** have the ability to provide your employees with personalized feedback about their results with tailored recommendations to help employees seek support.
- + **Recognizing the global toll of the COVID-19 pandemic on mental health, Jacobs invested in a free, open-access screening tool, One Million Lives to catalyze access to mental health support on a global scale.**

- **Set benchmarks and actionable goals for improvement.** Use insights gained from your assessment to identify areas of concern specific to your workforce and establish baseline scores. Use these scores to set measurable goals for company improvement that meet the unique priorities of your workforce.
 - + When **YMCA** learned through pulse surveys that employees were struggling with loneliness, they organized weekly virtual coffee chats for employees to connect.
- **Create targeted campaigns to reduce stigma and promote access.** You can analyze assessments to determine if there are cultural barriers to accessing mental health services. Use these results to create tailored campaign messages that resonate with your workforce.
 - + **Shell Shipping & Maritime** used results from an independent assessment to create tailored resources that resonated with the unique job stressors of its seafaring workforce.
- **Make adjustments to existing programs to optimize efficacy.** Use your evaluations to identify program gaps and create action plans to better promote awareness of your company's programs and services for mental health, reduce identified barriers to accessing services and improve the helpfulness of these services. If you find some initiatives aren't yielding the desired impact, consider this a cue to re-target your efforts.
 - + When **Citigroup** identified a rise in stress and burnout in its annual engagement survey, in addition to introducing targeted programs, leaders took the opportunity to revise their survey with a new section on well-being and manager support to broaden their understanding of underlying causes.



[Our] survey is a real, living and breathing tool for our managers.

Pattie Gould

Global Head of Total Rewards, CitiGroup

- **Measure progress over time.** Make a plan to regularly conduct assessments to the progress of your mental health initiatives against your established benchmarks. Keep in mind that the mental health needs of your workforce will continue to evolve over time. A proactive plan for ongoing measurement can help your company stay informed and adaptive to these changes.
 - + When **Blackrock** identified through periodic surveys that working parents were struggling to balance work against family demands during the pandemic, they increased options for flexible scheduling and expanded paid time off to support family care needs.
- **Report a return on investment for your mental health initiatives.** Keep track of **cost-saving metrics** that underscore the value of your workplace mental health efforts, such as productivity indicators, employee retention metrics and changes in absenteeism.



You want your programs to be able to tell a story. You want them to improve on health and well-being. But it's also important that we try to tie that back to a larger story as well.

Jason Morgan

Global Health and Wellbeing Lead, Splunk

STEP 5: Share Your Success.

Use data to celebrate as well as improve your workplace mental health efforts. Make a plan to recognize and communicate when your company achieves milestones such as meeting progress goals or exceeding national benchmarks on workplace well-being initiatives.

- Share program success and returns on investment with company leadership to make the business case for continued or additional investments in workplace mental health initiatives.
- ★ **Report on your company's progress to your workforce while actively seeking input for improvement. Demonstrating your company's responsiveness to employee input is in itself a **strategy** to enhance feelings of trust and support, and can improve participation rates for future assessments.**
- Publicly announce how your company incorporated employee feedback to create a culture of mental well-being at your organization. With **81% of individuals** reporting they prioritize workplaces that support mental health, promoting your efforts can give you a competitive recruiting edge.
- Share your story of using data to inform strategic and impactful mental health initiatives through conference presentations, town hall events and media interviews to inspire other organizations to take action on workplace mental health.





- Earn prestige and recognition for your organization by submitting your company achievements for awards and certifications, such as:



Bell Seal Certification

The Bell Seal for Workplace Mental Health national certification program recognizes employers committed to creating mentally healthy workplaces. Led by Mental Health America's rich history in research and advocacy, the Bell Seal's holistic evaluation of employer practices considers the entire employee experience.



Carolyn C. Mattingly Award for Mental Health in the Workplace

Jointly awarded by the John Hopkins Bloomberg School of Public Health and the Luv u Project, this award recognizes employers who demonstrate leadership in corporate social responsibility and adopt effective mental health practices in their own organizations.



This Can Happen Awards

Launched in 2019, This Can Happen Awards celebrate and recognize companies and individuals who have shown excellence in their approach towards positive mental health for their employees and colleagues.



Ragan's Workplace Wellness Awards

Employers can apply in several categories, including outstanding wellness programs by company size, or an award for a specific workplace initiative. Employers can also nominate individuals or teams for their efforts to improve workplace mental wellness.



Resources to Help You Get Started

Take advantage of these free assessment tools.

- **The Belonging Barometer**

Over Zero | American Immigration Council

This new tool is robust, accessible and readily deployable to organizations aiming to advance belonging. The barometer incorporates dimensions of connection, psychological safety and co-creation into a 10-point scale of exclusion to belonging. It can be adapted to measure your organization as a whole or a specific unit of your company on a global scale.

- **Healthy Work Survey**

Healthy Work Campaign

A project of the Center for Social Epidemiology, the Healthy Work Survey for employers identifies work-related causes of mental and physical health problems. Survey participants receive a free, confidential report of personal results and tailored feedback. Organizations are provided with aggregate results and a benchmark score against the **NIOSH Quality of Worklife Questionnaire**.

- **Hero Scorecard**

Hero Health

The HERO Health and Well-being Best Practices Scorecard in Collaboration with Mercer © is designed to help organizations learn about best practices for promoting workplace health and well-being, and to discover opportunities to improve and measure progress over time.

- **Mental Health Employer Cost Calculator**

National Safety Council

This cost calculator, developed in collaboration with NORC at the University of Chicago, is an authoritative, easy-to-use tool providing business leaders with specific information about the cost of mental health (including depression, anxiety, and general mental distress) in their workplace based on the size of employee base, industry, and state.

- **Mental Health Pulse Template**

Quantum Workplace | One Mind at Work

A pulse survey template to help you understand employee perceptions around your mental health resources and support. This template asks employees for their point of view to ensure you are engaging and supporting every employee.



- **NIOSH Worker Well-Being Questionnaire (WellBQ)**

The National Institute for Occupational Safety and Health

The NIOSH Worker Well-Being Questionnaire (NIOSH WellBQ) provides an integrated assessment of worker well-being across multiple spheres, including individuals' quality of working life, circumstances outside of work, and physical and mental health status.

- **Workplace Mental Health Survey**

Mental Health America

MHA's Workplace Mental Health Survey helps determine the current state of employee mental health and well-being in the U.S. The survey also informs best practices that support mentally healthy work environments.

You can also consult with your EAP provider to learn what assessment services are covered with your contract. Or you may consider whether your company would benefit from expert consultation to evaluate and create a customized mental health strategy for your business.

- **Mental Health at Work Index**

The Mental Health Work Design Lab | One Mind at Work | Ethisphere

Spanning Protection, Promotion, and Provision of care, the 3 Ps Framework for Mental Health at Work is a comprehensive approach that assesses the full continuum of an organization's workforce mental health programs and services.

- **Safety Barometer Survey**

National Safety Council

This employee perception survey can help organizations draw connections between workplace culture and psychological well-being with worker safety. Measure meaningful elements of safety excellence to establish a baseline on: leadership engagement, supervisory support, employee participation, safety programs and activities as well as safety and organizational climate.



DISCLAIMER: Public health guidance on workplace mental health is evolving. Health Action Alliance is committed to regularly updating our materials once we have engaged public health, business and communications experts about the implications of new guidance from the mental health community and effective business strategies that align with public health goals.

This Guide provides an overview of workplace mental health issues, and is not intended to be, and should not be construed as, legal, business, medical, scientific or any other advice for any particular situation. The content included herein is provided for informational purposes only and may not reflect the most current developments as the subject matter is extremely fluid.

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