



Elevating Performance through Wellness Deloitte's Organizational Wellness Index for the Modern Workplace

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American culture, long celebrated for its self-reliance and independence, has changed as modernity and urbanization have taken hold over the past 250 years. The relentless pursuit of individual success has, at times, given rise to feelings of disconnection and alienation, deepening the roots of loneliness. This shift significantly shapes our national mindset.

The recent COVID-19 pandemic further heightened this sense of isolation, intensifying the mental health crisis that currently affects one in five people (roughly 47.1 million) in the U.S.¹ In 2023, the Surgeon General released *Our Epidemic of Loneliness and Isolation* emphasizing the severe impact of loneliness, equating it to the physical harm caused by smoking 15 cigarettes a day². Loneliness is linked to increased risks of anxiety, depression, dementia, heart disease, stroke, and susceptibility to viruses and respiratory illness³.

We have the power to make workplaces engines of mental health and well-being. Doing so will require organizations to rethink how they protect workers from harm, foster a sense of connection among workers, show them that they matter, make space for their lives outside work, and support their long-term professional growth.¹⁰

Beyond loneliness, there has been a significant rise in suicides, with close to 50,000 individuals in the U.S. taking their own lives in 2022 - an alarming 2.6% increase from the previous year⁴. This tragic trend extends to all segments of society, including the workforce. Numerous reported workplace suicides, combined with the nation's well-documented mental health crisis, have heightened employee concerns about how organizations prioritize mental health and well-being (MHWB).

With an average of 90,000 hours spent at work over a lifetime⁵, the impact of MHWB is substantial. Employee stress, burnout, and mental health challenges often arise from unhealthy work environments⁶, marked by poorly designed job roles, excessive workloads, harmful social norms, including disrespect from

leaders and colleagues⁷, and inefficient leadership. These factors can lead to decreased job satisfaction and engagement, heightened stress, and burnout⁸. Conversely, positive well-being emerges as a key predictor of work performance, surpassing traditional factors like job satisfaction, age, gender, and tenure⁹.

In response to these challenges, organizations are increasingly seeking a deeper understanding of their workforce's MHWB to enhance employee well-being and elevate pivotal performance metrics such as employee recruitment, retention, engagement, and productivity. However, conventional methods of allocating resources to individual level well-being programs have yielded limited results¹¹. Furthermore, solely assessing employee well-being through human resources (HR) surveys has inherent limitations, including low response rates, subjectivity, social desirability bias, response inconsistency, limited question scope, and the potential for tailored reports based on perceptions of data usage and audience.

Deloitte's Organizational Wellness Index: Activating the Surgeon General's Framework

To bridge this gap, Deloitte created the **Organizational Wellness Index (OWI)**, offering organizations a comprehensive snapshot of their current support for workforce MHWB across key operational functions. This tool enables leaders to make informed decisions, enhancing both workforce MHWB and essential metrics that impact return and value on investment. The OWI predominantly leverages passive "hard data" sources (e.g., HR data, infrastructure data), helping to ensure unbiased and factual criteria through objective, compliance-related questions, as opposed to relying solely on subjective employee sentiment or opinion. In developing the OWI, we drew inspiration from various empirically based programs* as well as *The U.S. Surgeon General's Framework for Workplace Mental Health and Well-being* released in 2022. Developed in response to the pandemic, this framework underscores the vital role workplaces play in enhancing employee and community well-being.

The OWI incorporates six activators and 230 evaluation factors, converging to provide overall organization maturity score. The scoring output, ranging from 0 to 4 is plotted on a [Maturity Spectrum](#) (Figure 1), reflects the organization's current operations relative to workforce mental health and well-being (MHWB). Achieving the highest maturity level (Transformational), signifies the adoption of a systemic organizational approach for workplace MHWB.

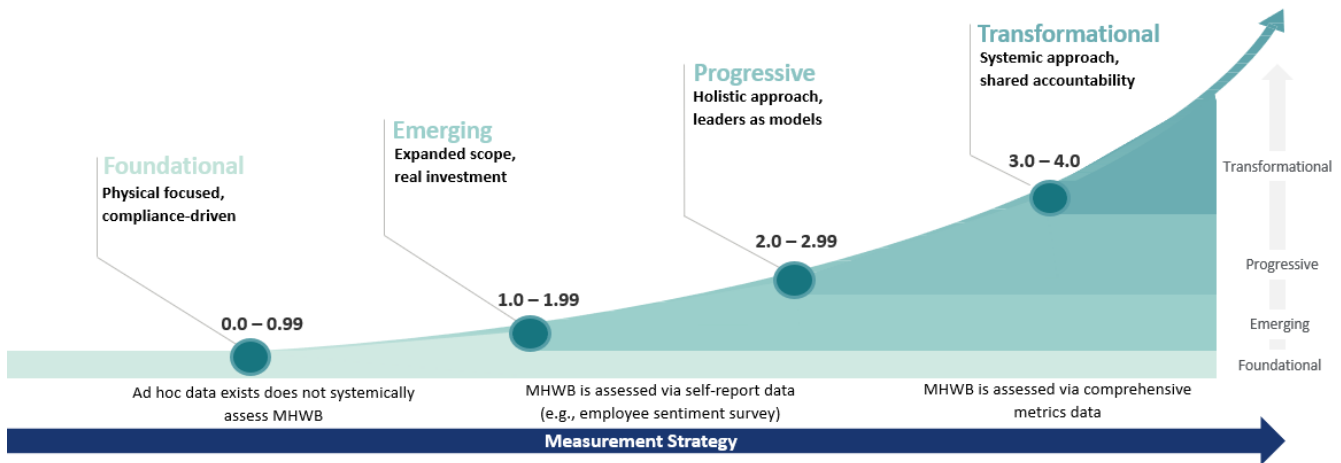


Figure 1: Deloitte’s OWI Maturity Spectrum comprises four levels to which an organization’s scores are mapped

* The Organizational Wellness Index (OWI) was developed by Dan Pelton (Ph.D.), Kelsey Brock (Ed.D., LPC), and Justin Maki (Ph.D., LPC). The development of the model incorporated guidance from various sources including the Substance Abuse and Mental Health Services Administration’s Workforce Program Initiatives, Centers for Disease Control and Prevention’s (CDC) Worksite Health Score Card, CDC-National Institute for Occupational Safety & Health’s Healthy Workforce Design and Well-being Program, the Center for Workplace Mental Health Working Well Tool Kit, Mental Health America’s Workplace Mental Health Toolkit.

The OWI presents results through a user-friendly dashboard, offering a visual representation of an organization’s overall maturity and performance across the six activators. Leaders can explore individual activators for detailed results on associated evaluation criteria. Additionally, they can assess alignment with *The U.S. Surgeon General’s Framework for Workplace Mental Health and Well-being*, gaining insights into how their initiatives correspond with this framework. This comprehensive dashboard serves as a valuable tool for understanding the organization’s current state and making informed decisions to enhance workplace MHWB.

Path Forward Post Assessment

Following the OWI, organizations receive a report that offers detailed and customized recommendations to advance their maturity across the six activators. These considerations are thoughtfully prioritized based on level of effort and estimated impact on the organization. The customized recommendations report is a practical roadmap to enhance policies and practices to improve an organization’s overall MHWB and drive positive business outcomes, including employee performance, retention, and other relevant metrics. For instance, if an organization scores low in Analytics, a specific recommendation could be to incorporate MHWB questions into exit interviews. We can assist in developing these questions aligned to specific business metrics, such as employee attrition. Once these MHWB questions have been implemented in exit interviews, organizations can make data-driven policy or program adjustments (e.g., providing more predictable work hours) to understand key MHWB drivers of retention and attrition.

Our Organizational Wellness Index is part of a suite of models that build a comprehensive analysis of organizational wellness. Organizations also need to consider employee sentiment. To address this, we developed a supplementary tool, a **Workforce Wellness Pulse** solution, which provides an in-depth, visual analysis of the workforce’s perception of individual MHWB and the organization’s current support in fostering MHWB. It also provides an overall score for workforce burnout at a specific moment in time, helping leaders to make informed decisions to improve MHWB in specific areas.

Conclusion

Adopting a comprehensive approach to workforce MHWB provides organizations with both qualitative and quantitative insights. These insights help empower leaders to tailor MHWB policies, processes, and initiatives to address unique needs of employees and the organization. This approach fosters a workplace culture prioritizing MHWB that can impact organization-specific business metrics and outcomes. The ongoing mental health crisis can have negative repercussions on employees’ MHWB and organizations’ business goals and outcomes. When addressing employee stress and burnout, organizations are conversely addressing their metrics and business objectives. Tangible actions to instigate lasting changes in workplace culture can create an environment that supports and enhances employee well-being. For more information or to discuss how your organization may benefit from the Organizational Wellness Index, contact workforcewbmh@deloitte.com.

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