



ADVISORY

Fall 2022

Rethinking Employee Benefits

How Bonusly Integrates
Accessibility, Flexibility, and
Equity Into Its Benefits Strategy

PAGE 6



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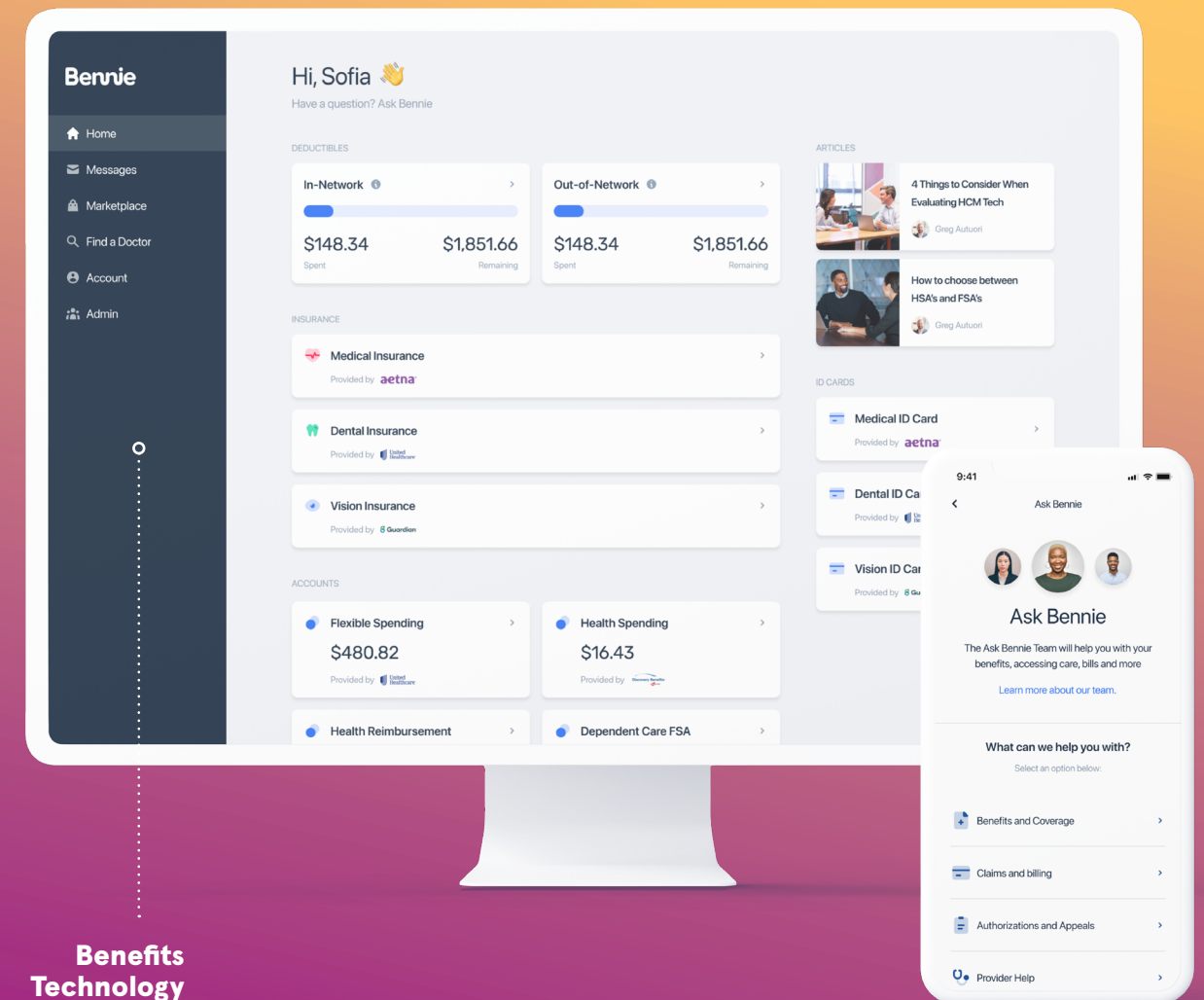
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How quickly things change.

It seems like only yesterday I was writing this note for our Fall 2021 edition of the HR Advisory Magazine. At the time, we were looking back on what we had all learned after just over a year of managing through the COVID-19 pandemic and adjusting to the new normal and the various impacts – positive and negative – that it caused for individuals.

Suddenly, we've got new challenges to navigate that would have seemed far-fetched just months ago, but that now appear to be here for the foreseeable future. Economic uncertainty and recession are looming on the horizon, and rising inflation and interest rates are causing routine business and personal expenditures to become more expensive. There's also the recent Supreme Court decision that changed years of women's health and family planning norms, complicated by inconsistencies from state to state and from carrier to carrier. In the HR community, we have a natural desire to take care of our people and provide them with the benefits and security they deserve, and we now have to figure out how to do that with more creativity and innovation than ever before.

If your company is like most companies right now, you are likely supporting your leadership team as it considers decisions ranging from the small (subtle changes to a PTO or benefits policy) to massive (complex personnel decisions that could instantly change your employees' lives). It's never been a better time to lean on your advisers, your network, and all the resources at your disposal to ensure you make the best choices possible for your employees.

In this issue, we explore various topics, such as how to most effectively get your leadership team's buy-in when enhancing your benefits program, how to give your employees the benefits they truly want, and how to communicate those benefits to existing employees and candidates alike. We'll also hear from Vicki Yang at Bonusly, an employee recognition platform, who explains how the company has crafted a holistic benefits strategy in partnership with its employees to best suit their needs.

As always, we thank you, our members, partners, and sponsors, for your continued participation and contributions to the HR Advisory community. Without you, this community and its content wouldn't exist, and we are forever grateful for your support.

Sincerely,
Greg Autuori, VP, Strategy & Benefit Operations at Bennie

Bennie CUSTOMER SPOTLIGHT



How Bonusly Integrates

Accessibility, Flexibility, & Equity

Into Its Benefits Strategy

Introducing Bonusly

Bonusly is a recognition and rewards platform that helps companies enrich their culture, enhance the employee experience, and encourage meaningful connections at work. With more of the workforce going remote, connections with others can diminish. Bonusly helps create more of those connections and trust among people. While Bonusly is a hybrid company with its headquarters in Boulder, Colorado, the team is predominantly remote.

Bonusly's People team prioritizes staying true to its company values and keeping those values in mind with every initiative, policy, and program they create.

Bonusly's Company Values

- Go Get Results
- Be an Excellent Teammate
- Default to Transparency
- Work Smarter
- Delight the Customer
- Seek and Embrace Diversity

Meet Vicki Yang, VP of People Ops at Bonusly

As VP of People Operations, Vicki leads a team that supports the entire employee life cycle, from the moment someone applies for a role to when they leave the organization. She oversees recruiting, onboarding, coaching, training of managers and employees, and creating better connections for better teams through the People programs.

Bonusly's People team is small but mighty. Working alongside Vicky is a team of recruiters, a People operations specialist, and a People partner. The People department at Bonusly is a collaborative, open environment, where everyone helps and supports each other. As feedback is encouraged, they all bounce ideas off each other and work together as a cross-functional team to amplify the culture of the organization.

"Each person has their own area of expertise, and it's then you see these ideas pop up as we're talking about things."

Vicki didn't plan to go into HR initially. When she did an internship at a cable company in their HR department, recruiting wasn't something she was passionate about. However, she later began working in the nonprofit sector for an organization that helped low-income families, and through this

HR role, she discovered the kind of work she was passionate about – helping others. So, she got her MBA and formally made a shift to HR for tech companies.

"I really found my path in People Operations as a way to help people figure out what kinds of the problems they're trying to solve and holding space to help them solve them. The key for me was really understanding what type of work motivated me and that I could do that through HR."

As an experienced HR leader, Vicki has seen the HR space evolve over the years and is excited about the trend toward more equitable, holistic health benefits. Rather than just offering the standard medical, dental, and vision plans, more organizations are beginning to explore benefits like mental health coaching, financial wellness, pet insurance, access to parental benefits outside of parental leave, and more.

"What we often do with a lot of People programs is we'll think about what serves the greatest number of people. But if you think about it, that's the dominant group, right? If we really care about equity, it's not just about the greatest number of people that it serves, but thinking about what we truly believe in and where we want to put our money to help serve our employee population."

How Bonusly Aligns Benefits With Its Values

At Bonusly, values are baked into everything the organization does, including benefits.

"We want to create more equity in what we offer. People need different things at different points in their lives. So we try to create as much flexibility as we can."



Rethinking Benefits to Be More Flexible & Accessible

Bonusly provides several stipends employees can use to prioritize their wellbeing. For example, the wellness stipend can be used for almost anything, whether it's getting a bike, booking a therapy session, or a massage.

The pandemic has also made Bonusly rethink some of its benefits offerings as the organization became more remote and distributed. Previously, the offices would have perks like paid breakfasts and lunches. But when the organization became hybrid, the People team had to evaluate how to bring those same perks to those working from home. It wasn't as simple as providing a one-size-fits-all food delivery service because not all employees have access to those services where they live. An employee may also live in an area that doesn't have many healthy food options nearby either.

The People team is currently looking at vendors who can offer a food service that aligns with their values to be equitable and accommodate people who don't have access to the same services as those in larger cities. Bonusly has also introduced a benefit for employees who are breastfeeding. If the individual needs to travel for work, the employee can overnight the breastmilk to the location at the company's expense.

Using Feedback from the Team to Boost Offerings

As transparency is valued, the People team asks for feedback to see what's working for employees and what isn't. When they received feedback that the vision insurance didn't cover enough, they went and enhanced the plan offered.

Another thing they've gotten a lot of feedback on was pet insurance, and employees can now access pet insurance options through Bennie's benefits marketplace. They've also seen an interest in wellness and resiliency benefits. Vicki and her team examined what may be causing the burnout and incorporated flexible solutions like "rest from home" days to combat exhaustion and boost engagement.

"It's essentially extra time off because we need that extra time, those three-day weekends we found to be so much more valuable, and four-day weekends even more so. When people come back, it's noticeably different."

What HR Leaders Should Think About When Evaluating Their Benefits Strategy

For Vicki, the first two words that come to mind are accessibility and equity. HR Leaders should first have a clear understanding of the organization's philosophy around benefits along with the overall company goals and strategy.



Once you have that guiding light to help you navigate the way forward, get feedback from your employees to get a true understanding of what their needs are. From there, you can narrow down and prioritize what the must-haves are, see where these fit into your budget and find creative ways to add benefits in a cost-effective manner. But, keep those values of accessibility and equity in mind – and be wary of bias. Sharing your ideas for initiatives with team members who can offer a different perspective can be insightful.

"It could also be pulling in someone who's not in HR or in benefits to talk through some of this stuff with because they're not going to look at it with that lens. So don't be afraid to work with other people as you're trying to build this out."

Another challenge may be getting that buy-in from the leadership. Vicki suggests anchoring initiatives to values and framing them in a way of putting actions behind the values that the company represents (essentially, "putting our money where our mouth is" in terms of commitments to DEIB). Getting market data to show what other companies are offering will also add strength to your argument.

"If you can come with the numbers and data points, I think that is a more convincing argument. Anecdotal pieces help because they paint the picture, but I find that if you can find ways to quantify the data as well, it's been interesting."

Employee benefits is a constantly evolving space, but building out that foundation, doing the research, and getting different points of view will help point you in the right direction. ■

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1. Gallup. *What Is Employee Engagement and How Do You Improve It?*. Gallup. Available from: <https://www.gallup.com/workplace/285674/improve-employee-engagement-workplace.aspx#ite-285782>

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HOW TO FOSTER A CULTURE OF HEALTH AND WELL-BEING IN THE AGE OF EMPLOYER TRUST

By: Patricia Casey



The inextricable link between employee health and well-being was put in the spotlight by the COVID-19 pandemic. A study by [Economist Impact](#), commissioned by Cigna, showcased that business and economic success is tied to employee health and well-being.¹ This aligns with other research, too, which found that for [every dollar spent](#) on an employer-sponsored health plan, an employer gets \$1.47 back in financial benefits, such as lower medical costs, increased productivity, stronger retention, lower short- and long-term disability costs, among others.²

Companies are in a unique position to promote workforce health, which is good news for HR professionals. According to [research](#) from global communications firm Edelman, workers consider their employer to be the most trusted sources of information and that people trust their employers' more than mainstream media and the government.³

HERE ARE FOUR WAYS TO FOSTER A CULTURE OF HEALTH AND WELL-BEING IN TODAY'S ERA OF EMPLOYER TRUST.

ONE **Normalize Mental Health Care.**

Employee mental health is a pervasive workplace issue that affects employee well-being, morale and job satisfaction, which can lead to higher employee turnover and lower productivity. With the lingering effects of the pandemic and today's divisive social issues taking a toll, the mental health of workers is more fraught than ever.

Address burn out, stress, and fatigue within your workforce, which are top barriers to business growth, and destigmatize mental health. Educate employees on mental health resources within your company early and often, and build a culture that encourages employees to seek help when they need it and feel confident there won't be job repercussions for mental health care. Tap senior leaders to set an example by sharing with employees how they take care of their own mental health or take time off to destress and decompress. Encourage leaders and managers to have team and one-to-one conversations that encourage self-care.

TWO Promote Inclusion and Work-Life Balance

Companies that promote an inclusive work culture and work-life balance will ultimately build greater resilience among their workforce. A 2020 Cigna nationwide study found that only two out of five people surveyed had optimal resilience to face life's challenges.

Experts have noted that employees who work at a company with a diverse and inclusive culture feel they can be true, authentic selves at work and often report higher levels of resilience than employees who do not. Beyond employee diversity, a [McKinsey & Company analysis](#) reaffirms the strong business case for gender, ethnic and cultural diversity among corporate leadership—and that this business case continues to strengthen. “The most diverse companies are now more likely than ever to outperform less diverse peers on profitability,” their analysis says.⁴

When people feel they are connected to something bigger than themselves, and to the mission of the organization, they are more likely to be resilient and stay at work as well. Having optimal physical and mental health is also key to being resilient, and one actionable way organizations can enable this is to encourage work-life balance for their employees. Since work-life balance can mean different things to different people, employers need to be flexible with how they approach it.

THREE Strengthen Leader-Worker Connections

The Economist Impact study suggests there is a [disconnect](#) between workers and senior leaders on how they define a healthy workforce. For example, executives ranked “having access to quality health care” as the most important aspect of employee health, whereas workers ranked “having a good work-life balance” as most important.⁵ Edelman's Barometer research indicates that employer communications are the most trusted channel for receiving information. With this in mind, promotion a healthy workforce should start at the top of the organization. Make sure your CEO is visible championing a culture of health and that leaders are sincere in their communications about health and remain understanding to an employee's point of view. Equally

important to building trust and promoting a healthy culture is the manager-worker connection.

Consider having executive leaders and managers gather employee input to inform health improvement initiatives to address the issues that matter to their workforce. Understand what the employee well-being needs are, and ensure those needs are incorporated into employee communications and workforce health policies and initiatives.

FOUR Demonstrate Commitment and Accountability

Edelman's research shows that two-thirds of employees are more willing to work for a company that follows through on its commitments. This means CEOs and senior executives should do more than demonstrate leadership in promoting workforce health. They should be accountable as well. Establish key performance indicators (KPIs) around healthy workforce goals to show you recognize the importance of a healthy workforce.

Senior executives ranked “employee health and well-being” sixth on a list of indicators used to measure business performance, according to Economist Impact survey data. Workforce health should be considered a top priority, to which organizations should demonstrate a multi-year commitment from the CEO-level down.⁵

There's a fundamental need for businesses to build and nurture a healthy workforce culture. Companies promote acceptance of mental health support, encourage work-life balance and embrace workforce inclusion, while holding themselves accountable by setting priority KPIs around a culture of health, will be better able to drive worker well-being, higher productivity and better business performance. ■

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Patricia (Patty) Casey is a results driven leader with a broad spectrum of operations management in the healthcare insurance and disability industry. A demonstrated track record of delivering successful business results by focusing on leadership development, productivity, process improvement and optimizing technology solutions. She currently leads the Benefits & Exchange Technology Solutions team for Cigna's US Commercial Markets. Previously she served as the Vice President of Client Onboarding leading a team responsible for Cigna's US Commercial National and Regional Client service relationships. Prior to joining Cigna, Patty held various roles with a National Disability Advocacy firm, responsible for the overall operations including long-term planning to support strategic goals. She led the development, design and transition to a new business platform to improve operating efficiency by twenty percent.



¹ The employer imperative: The role of employers in driving US economic vitality through a healthy and productive workforce, Economist Impact 2022
² Return on Investment for Offering Employer-Sponsored Insurance, Avalere Health 6/28/22
³ 2022 Edelman Trust Barometer, 1/24/2022
⁴ Diversity wins: How inclusion matters, McKinsey & Company, 5/19/22
⁵ Executives and employees agree: A healthy workforce is business critical, Cigna 6/2021





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Why You Cannot Leave Financial Wellness Out of Your DEIB Plan



When considering stronger diversity, equity, inclusion and belonging efforts, we often first tackle our hiring practices. Next, teams often think about training – making sure managers are well-versed in things like microaggressions or unconscious bias. Companies have put countless hours and resources behind these efforts, for good reason.

But a gap still remains. For instance, women’s salaries on average are only [83% of their male counterparts](#). So, what’s the next frontier your organization can tackle to further DEIB? Financial wellness.

Financial wellness looks different for everyone, but put simply, it’s the state wherein a person feels confident meeting their economic responsibilities and planning for their financial future.

401(k)s, the most commonly provided financial wellness benefit, are still only offered by [68% of private employers](#), and are notoriously inequitable. White 401(k) participants invested an average of [26% more per month](#) toward retirement savings than Black 401(k) participants. And for others, investments are held in other asset classes, due to [various cultural norms or historic context](#).

Financial Wellness and DEIB

While most Americans stress about money, underrepresented minorities have higher than average barriers to entry toward financial stability. After all, financial situations and planning for the future look drastically different for various populations:

- Men pass financial literacy tests at a rate of [two times](#) their female peers.
- Black college graduates owe an average of [\\$25,000](#) more in student loan debt than white college graduates.
- [69% of Latinos](#) in the U.S. have no access to retirement plans through their employers.
- [More than 1 in 5](#) LGBT households are unbanked or underbanked (23.0%) compared to 18.0% of non-LGBT households.

You could be missing out on top, diverse talent by not acknowledging these discrepancies and offering financial wellness programs that help combat them. And your existing employees could be struggling or feeling undersupported by the benefits you are currently offering.

Financial Wellness Programs Are Key – But Not One-Size-Fits-All

While the above insights are alarming, it’s critical not to rush a financial wellness program as a one-size-fits-all

solution. Broad benefits provide a good start, but employers must recognize that employees from different demographic groups may need or want unique financial benefits. Thus, a [sound financial wellness solution](#) should be customizable to meet the needs of each employee.

What does an inclusive and personalized financial wellness program look like? Let’s take a deeper look at three key areas of financial wellness, how they affect different populations, and why supporting these initiatives can help you attract and retain top talent.

1. Student Loan Management

Student loans and debts differ across demographics and don’t just affect younger or entry-level employees. With high-interest rates and limited financial resources, even senior employees could be paying down student loans.

- Women hold roughly [two-thirds](#) of all student debt in the U.S.
- Out of women undergraduate borrowers, Black women carry the most student debt, averaging [\\$41,466.05](#) one year after graduation.
- [LGBT adults are more likely](#) to have federal student loans than non-LGBT adults (35.4% vs. 23.2%).
- Native American and Alaska Native student borrowers owe the [highest](#) monthly payment.

By acknowledging that student loans affect diverse populations differently, and offering a broad range of [student loan management options](#), you signal that your company values meeting its employees’ needs — no matter their demographic group.

2. Wealth Building Options

Retirement plans — and savings in general — greatly vary by demographic group and socioeconomic status. As an employer, you can level the playing field by providing wealth-building options that serve all communities.

Long-Term Wealth Across Demographics:

- Only [39% of women](#) have three months’ worth of living expenses saved, compared to 55% of men.
- [19% of women](#) are confident that they are on track to retire with enough money, compared to 35% of men.
- [More than half](#) of LGBT households had less than \$50,000 in savings, compared to 4 in 10 non-LGBT households (55.2% vs. 41.5%).
- [About 4 in 5](#) Latino households have less than \$10,000 in retirement savings, compared to 1 in 2 white households.

If you want to build a loyal, diverse employee base, help them build for the future through wealth-building options that serve their specific needs. What better way to show your employees that you want them to stay for the long haul than by supporting them for the long haul?

3. Personalized Financial Literacy

A massive gender and race gap in financial literacy could significantly affect your current employees in various ways. Providing appropriate solutions could also be the missing piece to your recruitment strategy.

- Men pass financial literacy tests at a rate of two times their female peers.
- Black and Hispanic women have even lower literacy levels than white women, with only 11% of Black and 7% of Hispanic women deemed financially literate.
- More than 4 in 10 Black LGBT households were unbanked or underbanked (46.9%), as were three in 10 Hispanic LGBT households (37.6%).

If you want to retain top, diverse talent, keep them engaged not only with work, but also with benefits that make them feel seen. An added advantage is that keeping employees engaged can lead to 23% higher profit.

Don't Forget to Communicate Your Benefits

Given the above, it's clear that an inclusive, personalized financial wellness program is a must-have for companies. But what's the next step? Ensure people know about it and how to use it. 78% of employees say they want their

employer to more proactively and clearly communicate the financial wellness benefits they offer. Consider including your financial wellness offerings in job applications, your company website, and during the onboarding process and in company town halls.

Looking Forward

Financial situations can look widely different across diverse groups in today's world. And although adding a financial wellness program won't solve every financial problem, it can make a positive impact.

Learn more about how Betterment at Work's inclusive and integrated solutions can help your company add financial wellness solutions that support your DEIB initiatives at betterment.com/bennie.

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Why Accommodation Can't Be Overlooked When it Comes to Retention

By: Jennifer Wiseman

Making our workplaces fair, equitable, and accessible should always be our goal, and not merely because nondiscrimination laws like the Americans with Disabilities Act require it. Equity is something to strive for, both because it is the right thing to do and for the advantages it can provide to our businesses. An equitable, accessible workplace – one that makes accommodations for its disabled workers – is a diverse workplace. Diversity, in turn, promotes creativity, innovation, and engagement, all hallmarks of a highly successful business.

This has always been a crucial issue, but now, more than ever, we need to be aware of the importance of ensuring our workforce is able to work – because our workforce is changing. COVID-19 is likely to have disabled an estimated 1.2 million people between 2020 and 2021. The U.S. Bureau of Labor Statistics (BLS) estimates that 496,000 of those people

are participating in the labor force now. Additionally, the nondisabled population in the workforce decreased by 34,000. Those are staggering numbers, and the number of people with disabilities entering the labor force is only going to increase as our workforce ages.

Creating a more accessible, inclusive workplace by accommodating the needs of workers allows organizations to keep valued employees, avoid unexpected onboarding or training costs, and even attract a new, diverse pool of high-quality talent. These changes needn't be costly or time-consuming. In fact, many are simple to implement, with no cost to the employer.

Accommodations Provide High Value for a Low Cost

A reasonable accommodation, as defined by the Americans with Disabilities Act, is an adjustment made to a work setting, job, or to the applying and hiring process that makes it possible for qualified employees with disabilities to perform the essential functions of their job. The Americans with Disabilities Act (ADA) further accounts for physical and mental disabilities, both permanent and temporary.

Accommodations, by and large, aren't expensive, sweeping changes. Taking action to allow an employee to work when they otherwise couldn't might be as simple as providing a chair or standing desk at their workstation, rearranging existing furniture in a meeting room to make it more accessible, or establishing flexible hours for the worker one or two days a week. The numbers back this up, too. According to a survey by the Job Accommodation Network (JAN), 56% of accommodations cost nothing to implement. Of those who had to pay a one-time cost to implement changes (about 39% of respondents), the median expenditure was \$500. Ongoing costs to employers were even less frequent, with only around 5% of responders reporting annual expenditures that amounted to a median of \$20 per employee in need of accommodations.



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So, you know the costs are low, but maybe what accommodation looks like is still unclear. To help clear that up, let's review just a few examples of both large and small-scale accommodations that can make a positive impact on a worker with disabilities and create a more inclusive workplace:

- Modified or flexible scheduling, part-time hours, flexible breaks, and job sharing allow employees ample time to attend appointments or rest as needed.
- Taking steps to reduce distractions in an employee's workspace can take many forms. For example, private offices, higher dividers between workspaces, allowing an employee to work from home in full or in part, or even allowing employees to wear headphones or earplugs while working are all effective ways of reducing visual and auditory distractions for employees.
- Accessibility options around the office, like reserved parking spaces, ramps into the building, accessible restrooms, accessible door handles, chairs and standing desks, and screen magnifiers or readers.
- Policy changes to allow service animals in offices that otherwise have a "no animals" policy.
- Job restructuring, such as removing non-essential tasks, reassigning responsibilities that can no longer be completed, or allowing an employee to work in a different location.
- Providing accessible documentation—videos have transcripts, and audio is available for text documentation like handbooks.

While these are some common examples, this isn't a comprehensive list. The accommodations your organization provides should account for the specific needs of your workers.

An effective and reasonable accommodation for one person may not be sufficient for another. The ADA and Equal Employment Opportunity Commission (EEOC) can assist your organization in coming up with specific solutions for individuals. That said, any step toward making your workplace more accessible and inclusive is likely to improve productivity and morale, as well.

The JAN survey, ongoing since 2004, has found that the overwhelming majority of employers – around 75% – reported that the accommodations they had implemented were effective, and their businesses reported multiple benefits as a

result. The most important and frequently mentioned of those advantages was increased retention.

Experiencing the Positive Impact of Workplace Accommodations

Accommodations allow a disabled employee to return to work more quickly after an injury and continue working when they may not have been able to otherwise. Leave times are shortened or eliminated entirely, and you close the productivity gap that would have been created by an employee's absence or voluntary termination. As a result, your business spends less time and money on recruiting, onboarding, and training a new temporary or permanent replacement, and you get to keep a valued employee, as well.



Disabled workers aren't the only ones benefiting from accommodations. The positive effects of implementing them extend throughout the company, reliably boosting overall worker morale and productivity. The JAN survey of employers implementing accommodations found that about 55% of businesses reported increased workforce morale after making accommodations for workers with disabilities. That higher morale boosted productivity as well for about 49% of respondents. These factors spill over into other positives: increased profitability, improved customer base, and lowered turnover overall.

As you can see, when your people thrive, your business thrives. By taking steps to ensure that you are creating a more accessible, equitable workplace, you're creating happier, more engaged employees.



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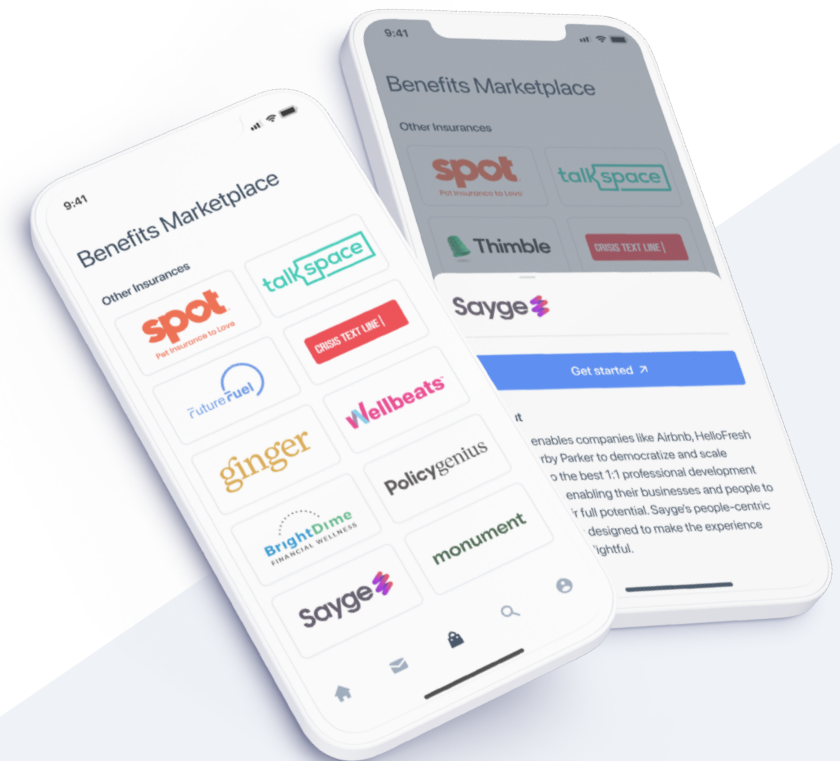
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Lulafit provides holistic employee wellness programs that support employees' physical, social, and mental well-being. Live and on-demand classes including fitness, nutrition, mental health, social health, and professional development are available. Lulafit also offers personalized 1-1 coaching and curated team-building events. Contact Bennie to learn more.

vsp individual vision plans

VSP is the largest vision insurance provider in the nation. VSP Individual Vision Plans were created as a division of VSP for people to maintain access to vision care when they don't have coverage through an employer-sponsored plan. With VSP, you get choice. You can pick the plan that's right for you and choose your payment schedule. Plus, you can visit any VSP network doctor you like, whether it's close to home, work, or school. Contact Bennie to learn more.

Visit bennie.com/contact-us or email us at partnerships@bennie.com



Bennie BETTER BENEFITS

A NEW MILESTONE REACHED!
HR Advisory Celebrates 5,000 Members

We're excited to reach a new milestone of 5,000 HR Advisory members! Our members genuinely make this community the insightful and warm space it is. Seeing how HR Advisory has grown, along with the advice, conversations, dinners, and connections made among HR professionals, makes us look forward to all the ways the group will continue to flourish. Let's look at the group's evolution - and what members enjoy most about being a part of this community.

We asked five members, who each joined at different milestones, questions about their experiences and most significant takeaways from being a part of the group.

1,000
MEMBERS

MARCH 2021



ERICA WOODS

How has HR Advisory helped you in your career since joining?

People Ops/HR can be an incredibly lonely role, especially when you're a team of 1. While most of my coworkers have multiple colleagues across many departments (sometimes) that they can speak with/confide in, vent to, and collaborate with on all things related to their role and, in many cases, their lives, I've never felt that my role affords me that luxury. In the best-case scenario (which I have with my current employer), my CEO is a safe space, but otherwise, there are precious few people I can run to for advice and no one to vent to, collaborate with, or learn quickly about new things in the field.

I find networking groups like HR Advisory (and my amazing mentor) are the most valuable tools in my tool kit. Simply having the ability to bounce ideas off of others living similar realities is wonderful, but when you add that the brilliant humans on the HR Advisory network are constantly sharing great stuff - whether ideas, presentations, open roles, webinars, software or providers that make their lives easier, or a joke that lightens a rough day - it becomes priceless.

What sets HR Advisory apart from other networking groups is, without a doubt, Denise Granados and her team. They are our advocates on this journey to learn and grow, and their partnership is as priceless as the networking opportunities that the group provides.

2,000
MEMBERS

OCTOBER 2021



AMY KRUGLAK

What is the most valuable thing you've gotten from being a part of this community?

As a solo HR practitioner focused on high-growth, fast-moving tech companies, the HR Community has been a great resource to stay connected with the latest trends and get information and advice. The Slack channel is incredibly well organized so that it's easy to use and find information on any topic, and the search feature ensures that you can find specifically what you are looking for. The webinars have also been extremely beneficial. All in all, I'd say that HR Advisory has been a great tool to have in my toolbox when I'm trying to learn something new or stay up-to-speed on the ever-changing field of HR!

3,000
MEMBERS

JANUARY 2022



HAKIM MYERS

How would you describe the connections you've made at HR Advisory?

The connections I've made are similar to co-workers in the coffee room; it's a great experience. I can hop in to ask a few questions as well as chime into the conversation when I have something valuable to add. It's great being able to discuss new recruiting tactics and challenges I'm having while searching for candidates with a distributed group of HR minds.

Being that a majority of my role has moved to a digital landscape, I've been able to utilize the Slack channels as another recruiting resource outside of LinkedIn. The "chat" community has been overwhelmingly welcoming, and I've appreciated everyone's openness to share advice/tips. My favorite part is being able to listen and learn about all the other experiences people go through on a daily basis. It makes me feel involved!

4,000
MEMBERS

MAY 2022



LESLIE TALAUE

What do you think makes HR Advisory different than other virtual HR groups?

HRA de-silos HR interactions and encourages direct contact with fellow people-focused peers. We are a collective of various backgrounds, experiences, educations, and personalities, united by our shared goal of helping others. We collaborate like colleagues and exchange thoughts, knowledge, and advice. And memes.

5,000
MEMBERS

SEPTEMBER 2022



KRYSTAL BRENDEL

What are you most excited about when it comes to being a part of HR Advisory?

I am thrilled to be part of HR Advisory and genuinely excited to develop relationships with experienced HR leaders across the country. HR Advisory has a mix of appealing factors like the in-person hosted events after two years of being fully remote, but the best part for me is having a bustling network of HR friends seemingly on speed dial through the very active Slack Community. I have already received some great help through many of the channels here, and given advice and recommendations myself. Effective HR leaders have a network to lean on when the businesses we support present compelling challenges, and HR Advisory is proving to be just that. This is what HR dreams are made of!



How to Get Leadership Buy-In to Enhance Employee Benefits

By: Jennifer Wiseman

Keeping your organization competitive in today's world means offering a comprehensive benefits package tailored to your company's culture and the needs of your workforce. As a matter of course, eventually, you're going to need to tweak your employee benefits package -- enhancing offerings, adding new benefits, and doing away with the ones that aren't working out. To achieve this, your benefits strategy must be malleable and able to shift with the changing demands of your employees. That is, of course, easier said than done.

Many important, well-thought-out initiatives have been sidelined by the hurdle of leadership buy-in. It's a story so common that the prospect of getting that initial buy-in may seem daunting, but with patience and a bit of planning, you'll be much better equipped to gain management's approval and support.

Timing Can Make or Break an Initiative

The right pitch at the right time makes all the difference, so keep abreast of what company leadership is dealing with right

now and stay up to date on your organization's current and future goals. If you know what's going on, not only will you be able to approach management when they're most receptive to hearing your ideas, you may be better able to pitch benefits enhancements as solutions to specific problems the company is having -- such as high turnover, burnout, or low engagement.

What does the right time look like? It depends on your company's culture and industry. However, there are a couple of times where you may have more luck:

- As mentioned, if your company is facing a specific issue, such as difficulty finding a qualified candidate for a position, and your planned benefits enhancements would help solve that issue.
- You may find more success pitching something that aligns with current or recent news stories, such as diversity, equity, and inclusion benefits – leadership has likely seen these issues in the news and will be more familiar with them and potentially more receptive.

No matter when you decide to pursue leadership buy-in, you should approach your company's C-level employees as early in the process as possible. Give yourself ample time to convince them of the worth of enhanced benefits. Not only will it curb the chances of your initiative being derailed, it will also prepare you for approaching employees with these changes down the road.

Frame the Advantages in Current Company Goals

To earn full support from leadership, you'll need to convince them of the advantages of a better benefits package in a way that matters to them. You know that expanding and refreshing your organization's benefits has tangible advantages for your company. A brief look at the research will tell you that modern, expanded options are key to improving productivity, engagement, and retention, but even exact numbers like these can still feel abstract. Explaining why these factors are important -- particularly if something like engagement isn't presently prioritized at your organization -- is in itself important, but to really sell your ideas to management, you need to get specific.

Your pitch should explore how the additions or changes you want to make will align with your company's current goals and initiatives. Know who you are trying to appeal to, and tailor your presentation to their particular interest within the organization.

Benefits can be used to patch holes and provide solutions to problems that all businesses face. With a bit of research, you should be able to track down how new benefits would be uniquely advantageous to your company. Take these examples, for instance:

- If your organization is looking to grow, accessibility benefits and remote work options can significantly expand your candidate pool, attracting talent you may not have had access to otherwise.
- Flexible scheduling options that allow employees to work outside of the traditional 9 to 5 might be beneficial if you have clients or customers outside of your organization's time zone.
- Cross-training opportunities and investing in employee education can close skill gaps and pave the way to more seamlessly filling specialized roles without taking on the onboarding costs of a new hire.
- If burnout or absenteeism are rising issues, telehealth options, wellness programs, and mental health benefits can help to combat them.

By framing new benefits as solutions to specific problems or facilitators of new initiatives, you're making their advantages more concrete for your leadership team. Not only will they better understand what you're trying to do, but you'll also have made enhanced benefits relevant to them and their interests. They'll appreciate your effort, and you'll likely earn new champions for your cause.

Anchor Your Data to the Bottom Line

Enhanced benefits will improve your workers' quality of life, potentially lowering their medical costs, easing burnout, and improving work-life balance. These are all important aspects to keep in mind and potentially bring up during your pitch, but when seeking leadership buy-in, you'll want to focus on touting the advantages new benefits will provide to the business.

Research done by the Harvard Business Review in 2015 found that moral framing – focusing on why, ethically, expanding benefits is the right thing to do, for instance – generally resulted in pitch failure. By emphasizing the business benefits first, success is more likely. Outline what the company stands to gain by enhancing benefits for its workers.

Keep It Simple

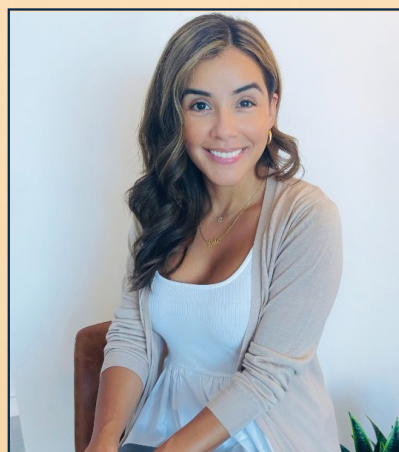
You've done your research, you know how enhancing your employee benefits package will affect the bottom line, which departments stand to benefit most from the changes, and the specific advantages and challenges posed by the initiative. You're ready to go, right? Yes, with one last bit of advice: keep most of the details in your back pocket, and start simple.

Whether you've got a team of C-level employees to convince or a single CEO, many factors -- some out of your control -- will influence whether or not you can gain their support. In the end, the two most important factors in gaining leadership buy-in for any initiative are how well you know your audience and how confident you are in your ideas. So, focus on what matters to the person or people you're presenting to. Keep your presentation as brief as possible, but have all that extra research handy. You'll be relying on those insights to answer questions and even pose some of your own if it allows you to steer your presentation.

Be confident, be informed, and be aware of who your audience is, and you'll have a much easier time gaining support from your management team for those vital benefits enhancements. ■

Communicating Employee Benefits Offerings

When Seeking Candidates



By: Giselle Lazo

Traditionally, employee benefits aren't shared until the recruiting process is well underway, and in some situations, candidates may not know what benefits an employer provides until they're asked to accept a position. Times have changed, though, and that's no longer the norm. With multiple studies indicating that more than half of today's workers value a strong benefits package over high compensation alone, why wait to put one of your most powerful recruiting tools to work?

When deciding whether or not to accept a position, a great candidate will care about more than just what benefits your company is offering, but the importance of a good benefits package can't be undercut. Don't be afraid to showcase your organization's offerings on social media, on your company's website, and during interviews. By communicating your benefits often and honestly, not only will you attract candidates that best fit your company, they'll likely come on board with a full understanding of what's available to them, increasing your ROI.

Let's take a look at a few methods to ensure you're promoting your benefits package to candidates in the most effective way possible. → →



Reaching Candidates Before They Apply

Job hunting is a lot more involved than just clicking an apply button. Surveys from both Careerbuilder (2016) and The Open University (2019) have found that the majority of job seekers are researching potential employers before they shoot off those resumes, and they're using every avenue available to them to do it. That's good news! Highlighting your benefits package for anyone researching your company will help your organization to stand out from others in your industry.

Here are a few tips that can help you get those benefits offerings in front of applicants' eyes:

- Ensure your company's website has a welcoming, easily navigable career page. This is a popular landing spot for potential applicants, and a great place to dedicate space to a complete listing of your current employee benefits and perks. Your company's LinkedIn and Glassdoor pages are similarly good locations to provide a benefits summary.
- Draw particular attention to the benefits that you feel make your company unique – in-demand offerings and those your own employees value most are great options to prop up on your careers page.
- Include employee testimonials on your company website (both text and video). If your current workforce has good things to say about your offerings, don't be afraid to let everyone know!
- While you don't want to clutter your company's Twitter or Instagram bios with lengthy summaries of your benefits package, you can mention your benefits when posting about new openings at your organization, and direct those interested to your career page for more information.
- Be aware of where your company has a social media presence and take steps to ensure those profiles are always up to date with links to your company website. The easier it is for candidates to find the information that distinguishes your company from others, the better.
- When using a job board website like Indeed or ZipRecruiter, make sure candidates can easily reach your website or LinkedIn profile from the listing. Don't hesitate to detail a few of your employee benefits in the listing itself, as well.

Getting Candidates the Right Information When Recruiting

Once you've moved on to interviewing and making offers, it's time to take a more personalized approach. Rather than hand off a packet of information and be done with it, ensure that your candidates fully understand what is available to them. Your candidates will get a sense of how your company values its employees, and onboarding your new employees later will likely be easier.

Check out these tips for communicating your benefits package to candidates:

Tip 1: Have an Expert on Hand to Answer Candidate Questions

Ensure that someone on your recruitment team knows the benefits package in and out. Many traditional benefits are quite complicated, and candidates will likely have questions. HR should stay involved at all steps of the process so that your candidates have a point of contact for any questions they may have about your offerings.

Tip 2: Be Clear and Be Honest

When discussing your employee benefits package with potential candidates, be candid about what your company offers. Don't over-promise – you'll wind up with an unhappy employee if an enhancement to the package that looked like it'd be added while the candidate was being interviewed falls through after they're hired – but don't be too vague, either. Your future employees will appreciate the transparency.

Tip 3: Show You Understand What Your Candidates Want

You and your recruiting team will get to know each candidate during the interview and hiring process. Use this to your advantage, and when you review your benefits package with them, highlight the parts of the package that are most likely to appeal to them. For example, recent college graduates are generally highly interested in student loan assistance benefits.

Tip 4: Offer a Sample Compensation Package for Reference

Consider including a total compensation statement in your job offer. Show off how you structure your benefits by creating a mockup package for the average employee at your organization, including compensation, bonuses, benefits, perks, and any additional salary a typical employee may make – such as commissions. Something like this can easily be templated, as well, to further customize for specific positions.

Tip 5: Don't Forget the Tech Stack!

Does your company have a portal where employees can view and manage their benefits? Many such platforms come with the ability to set up a guest account that you can use to allow candidates to explore what's available to them.

Communicating Early and Often Is Key

By communicating your employee benefits offerings to candidates early and often, you're more likely to attract talent that fits with your company's culture. Your organization will be better equipped to set itself apart from others in its industry, and you'll foster an atmosphere of trust and transparency out the gate -- a great foot to start off on with a new employee. 🗨️



HR Advisory Dinners

This past year we kicked off in-person dinners! Community is so important, and we hope this is a time to connect and get advice on current challenges and get to know others in the same space. The energy at these events makes us excited for more dinners to come.



Stacey Richey
VP, People, Corvus Insurance

"It was refreshing and energizing to be able to share space with my HR peers in person again. It reminded me of how important it is to have a supportive community of like-minded HR professionals. Thank you to the HR Advisory team for giving us this opportunity!"



Joseph Arquillo
Senior Manager, People Operations, Clyde

"Thank you to the Bennie group for putting on a tremendous event where I had the opportunity to connect with other individuals in the People Ops space. Genuinely enjoyed the ability to step away from work, have some in-person interactions, and enjoy the connections that were made!"

Upcoming HR Advisory Dinners

NEW YORK, NY → SEPTEMBER 2022
BOSTON → OCTOBER 2022
SAN FRANCISCO → NOVEMBER 2022



HR ADVISORY DINNER, BOSTON, MA



An Integrative Approach to Making Workplaces More Equitable

A Q&A With Nicci Morris, Founding Partner of The Onward Way

We had the opportunity to chat with Nicci Morris, an experienced People leader, coach, writer, and speaker, about her consultancy, The Onward Way.

With her partner, Jena Bell, the two take an integrative approach to creating strategies and solutions that help organizations address the unique workplace challenges that women, particularly women of color, face.

Tell us a little bit about The Onward Way. What made you decide to create this consulting group?

Nicci:

It was a combination and culmination of work, life, and education. My partner, Jena Bell, and I have nearly 50 years of corporate and coaching experience. She is a CPA and a certified life coach. I have an MBA with a focus on organizational leadership and change, and I am a certified cognitive behavior life coach. We came together to figure out how we can use our respective superpowers to help make workplaces more equitable for companies and for individuals. Part of our passion is rooted in our personal experience and the experiences of those who we've worked with. I've worked with big corporations and have done lots of individual interviews and focus groups. When I talk with them, I hear a recurring theme of a feeling that something is missing, whether it's opportunities to grow, or figuring out "work-life balance" (which we now know is not attainable). But what we've discovered is that there is a way to have a more integrated life.

We work with women and with companies who have women who they want to support to figure out how can we have more integrated lives and workplaces that don't just consider the employee experience but the life experience of employees. If you think of an EAP, we take that approach but in a much more refined, focused service that helps women with how they move through life and work. We think of it as moving away from this compartmentalization and into a more integrated life.

What have you seen as the biggest challenges organizations should address to elevate women in the workplace?

Nicci:

Part of it is understanding the full spectrum of what people experience. When you do an employee survey, for example, you're looking for trends. Well, sometimes these trends can miss what's happening in the personal lives of people, and in particular, with women. So, you have to really be careful, especially when you're thinking of intersectionality (people who identify as women and LGBTQ, Black, Asian, Latina, etc.). There's this intersectionality that can sometimes cause the responses in that data to not be parsed out in a way that's giving the full picture. So you have to be willing as an organization to dig deeper. And that's where we come in. We help leaders figure

out what the data says and what can we tease out of this data to create solutions that are going to be sustainable and have a positive impact on the culture and on people.

Additionally, I think something that can be a stumbling block for organizations is a rush to see results. Because the issues that we're talking about are systemic, the results are usually much more incremental than we would like to see. One more place there can be some hurdles is in understanding the need to make culture shifts and improvement a top down and grassroots up initiative. You can't just do top down, because then you have command and control leadership, which isn't going to work. You can't just rely on your grassroots team either, because ultimately the big decisions don't lie with them. You have to do a combination of attacking the problem from both directions so that you can get the support and buy-in you need (not to mention the ideas and the innovation from listening to all of those voices and getting all of that feedback).

Tell us about your methodology for coaching organizations and female leaders.

Nicci:

We take a three-step approach.

First, we start with inward. Inward is where we decide, "Okay, here is my take on life and work. Here is my experience in this culture, in my career, and in this industry." So it's not just professionally, but also personally. We don't believe that there is a "work hat" and "life hat" that you can take on and off. It's about your experience as an individual. We encourage leaders to own all of that experience, and that helps you to understand how it's all interrelated.

Then we think about outward. "How is what I'm thinking, believing and experiencing in life impacting the way that I co-create and interact with people at work or in my personal life?" So these are all of your foundational beliefs and systems that you have put together through your experience. If there are gaps between what you say you want to experience and what you're experiencing, Jena and I come in and help discover ways to close those gaps.

So once we've done the inward work and we've done the outward work, there's an opportunity to say, "Here's how I want to move onward." We take all of that work that we've done thus far and create an intentional, focused and action-oriented plan for how we're taking all of this work that we've done into the future and moving onward in a way that is going to be in alignment with what we say we want to do. Moving onward is creating a plan to close the gap between what you say and what you do.



What role does an organization's benefits package play in attracting and retaining women in the workplace?

Nicci:

It's huge. I've worked with companies and done work around culture and retention in particular, and the benefits package, (especially fertility and family planning, paid time off, and flexible/hybrid work) is critical, especially for women who juggle a greater percentage of the household duties. I think the benefits packages have to take life experience, not just the employee experience, into consideration. I've worked in HR for quite a while and each time you have to do an audit. What are people using and what aren't they using? And are they not using it because they don't know about it? If they knew more about the benefits, would they be utilizing it in a different way? I've interviewed people in the very same focus group within the same company, and they had totally different understandings about the same benefits.

What steps need to be taken to reach a point where equity and inclusion are the norms in organizations?

Nicci:

I think that the most important piece is the expectation. When I talk to companies and they explain what outcomes they want, I very often have to say, "Yes, and let's think about how we're going to approach that and what the timeline looks like, what success looks like, and how we know we're doing what we say we want to do." We have to be really clear about moving past the business case for inclusion and the need to be equitable in the approach. The business case has been made.

When it comes to the people, practices and policies within a system, how can we make sure that we are being thoughtful around the changes that we make in a sustainable way, while also considering that this stuff takes time to tease apart and to undo? There's so much breadth and depth to the work when it comes to equity that it's really important to step back, zoom out from it a bit and get a full lay of the land to see where you want to put your energy and your intentions in that moment, because there's so much work to be done.

A lot of companies don't know where to start. A lot of leaders who have good intentions don't know where to start. With our methodology, you start right where you are. You start with yourself – whether you're a CEO, a VP, a director, a manager or a frontline team member – and do the work to go inward, outward and then onward as a more authentic and inclusive leader. The most important thing you can do to have a more equitable workplace is to become more thoughtful and equitable as a person and as a leader. ■

Want to learn more? Connect with Nicci: [833-6ONWARD](tel:833-6ONWARD) or Nicci@theonwardway.com



Getting to the Core of What Benefits Your Employees Truly Want

By: Classi Wiley



Classi Wiley

is a Senior Benefits Consultant at Bennie. She has 17 years of experience in advising employers on the design, administration, funding, and communication of their Employee Benefit and Wellness programs.

These days, workers are placing greater importance on the benefits available to them through their company. For many – about 41%, according to a 2022 survey by Zippia – a comprehensive, useful benefits package is more important than even compensation. This means that to recruit and retain top talent, your organization must offer a competitive benefits package; not one that merely offers the hottest options of the moment, but rather one that meets the needs of the sort of employees you want to hire and retain.

Getting to the heart of your employees' wants can be a bit of a challenge, but it's by no means impossible. With a bit of research and an open line of communication between you and your workers, you'll be able to paint a clear picture of which benefits will best serve your organization.



Scope Out What's Popular Outside of Your Organization Right Now

Start your journey with some research. By familiarizing yourself with which offerings are in demand right now, you can forecast what options might be popular with your people and which ones align with your company's culture. There's a lot of data on benefit popularity and usage. Look into benefits that are in demand in your industry and with the demographics you currently employ.

In 2022, there were a few offerings that stood out more than others. Here's a glimpse into what was big this year:

- Expanded mental health services and telehealth options were more popular across the board, particularly as employees cope with burnout.
- Increased PTO, work-from-home options, and flexible schedules are both in-demand and great DEIB options.
- Hospital indemnity insurance, which assists in covering the cost of hospital stays, has been popular as workers face hospitalization from COVID and other illnesses.
- Identity theft protection is particularly popular with older employees. On the flip side, younger workers are more interested in student loan assistance.
- Year after year, retirement savings plans are considered one of the most important voluntary benefits an employer can provide. Likewise, financial planning and coaching services are quite popular.
- Pet insurance offerings have been on the rise for years.

When you research which benefits are most popular beforehand, you'll be prepared for your next step -- surveying your workforce. Employees likely will not know what sorts of benefits are out there. It's your job to prompt and inform them of what's available, allowing you to get a more complete picture of their wants.

Don't Guess — Ask Your Employees Directly

Who better to ask what would serve employees than the employees, themselves? Don't be afraid to put the question to your people — in fact, you should absolutely be asking them what they think. With pulse surveys, focus groups, and one-on-one meetings, you can zero in on the sorts of benefits your workers want to see.

When asking for their opinions, leave room for critique of your current offerings,

as well. Knowing what your employees perceive as weaknesses in your current offerings is just as useful as polling them about what they'd like to see in the future.

Of course, you can send out surveys all day, everyday, but it doesn't matter if you aren't getting responses. What can be done about that?

- Be honest and upfront about the purpose and scope of meetings and surveys. No need to be secretive! Your goal is to give workers more of what they want and need. Open with a formal announcement before you launch anything so workers know what's coming.
- Keep communication going and keep it employee-focused! Make sure your people know how valuable their feedback is, and check in periodically to answer questions and ensure that they have completed any outstanding surveys.
- Your workers need to have adequate time to respond to questionnaires, join in benefits discussion meetings, and stop by for one-on-one chats about the topic. If they're too busy, they won't respond. Consider setting aside specific times — not within their personal hours or breaks — where employees can complete surveys or attend meetings.
- Anonymity is of vital importance. Employees are considerably less likely to respond to a survey if they feel their answers can be traced back to them. Make sure that amid those face-to-face meetings and surveys requesting demographic information, steps are taken to protect employee privacy.

Demographics Can Help You Forecast Future Wants

Employees in different life stages, those with and without dependents, and those of different socioeconomic backgrounds are all going to place different values on benefits. A worker with children or one caring for an aging parent might appreciate dependent care reimbursement options, for example, while employees without dependents won't need it.

Look at your demographic data, then, to anticipate which benefits your employees might find most useful.

A younger workforce may be more likely to want student loan assistance, while older workers tend to be more interested in



retirement savings and financial planning. Used in tandem with your employee survey results, demographic data can put you on track to crafting a truly useful benefits package.

Paint a Clearer Picture With Usage Data

Usage data is great to get an idea of where you're getting that coveted ROI, but on its own, it doesn't necessarily provide a clear picture of why a given benefit is underutilized. Combine it with your employee feedback, though, and you'll see areas where greater communication or training may be useful to educate employees about what's available to them. You'll also be able to extrapolate which options may be best to expand and which you can cut back on or eliminate entirely to free up budget room.

Keep the Ball Rolling

To truly keep up with your workforce and provide them with the benefits package they want, you should be revisiting these steps with some regularity. Your benefits strategy needs to remain organic. Surveys and research aren't a one-and-done deal, so take what you've learned and evolve it as your workforce, and the world, changes. Strive for a culture of constant feedback, and get comfortable communicating with your people. Each time they feel heard and respected, the next revision will be a little bit easier. ■



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From the Community: On Access & Resources

"The HR Advisory community Slack is the best resource I've found for HR professionals. It's so well organized, has great content and provides very useful information."

Amy Kruglak, Sr. PeopleOps
Leader/Consultant, StartupPOPS



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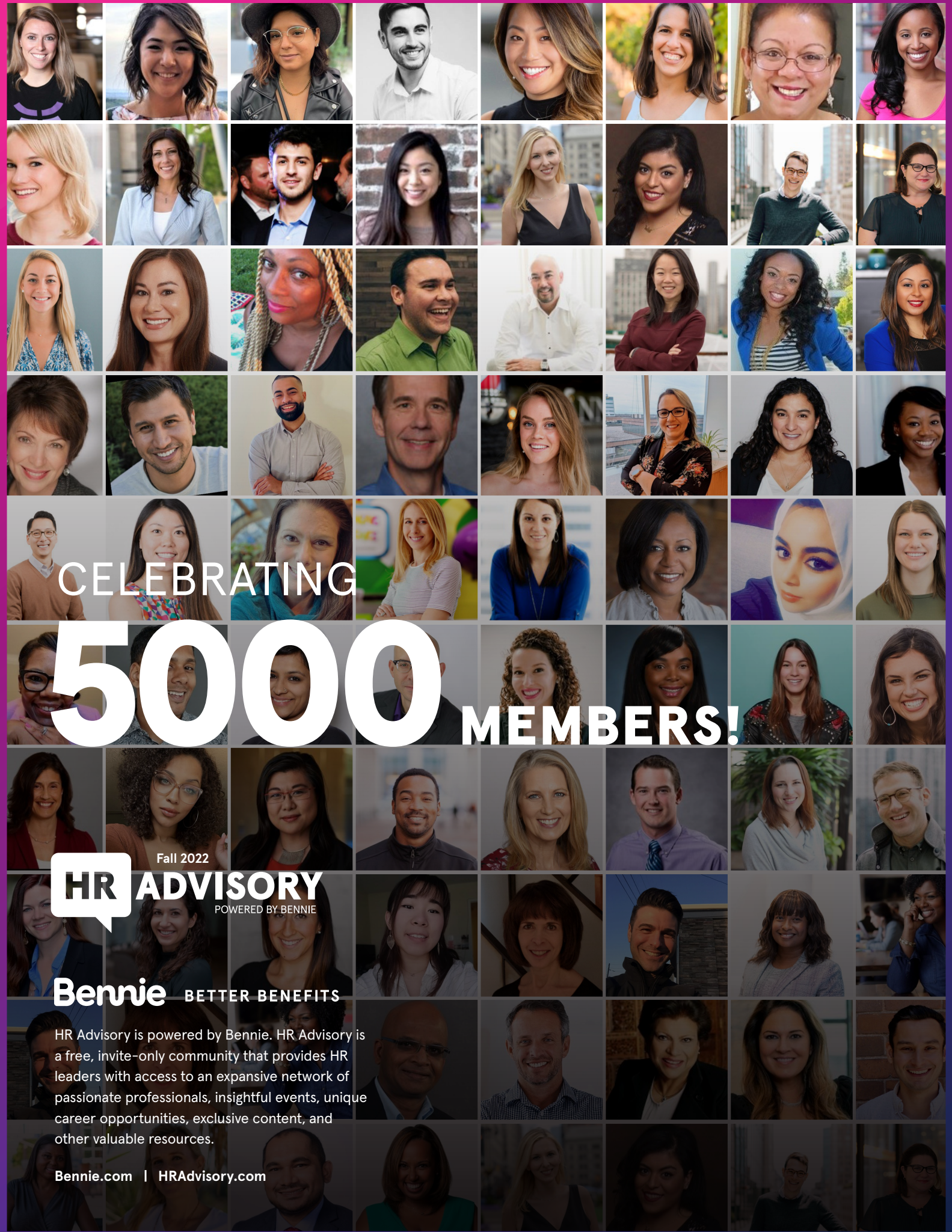
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