




Indicators for the ROI of Employee Wellness Programmes in South African Water Utility Organisations



Authors:

Modiegi L. Mathaphuna¹ 
Wim Roostenburg¹ 
Roslind M. Mokwele¹ 

Affiliations:

¹Department of Social Work, COMPRES, Faculty of Health Science, North-West University, Potchefstroom, South Africa

Corresponding author:

Roslind Mokwele,
roslind.mokwele@nwu.ac.za

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Orientation: Our research emphasises the importance of conducting a thorough assessment of employee wellness programmes (EWPs). By analysing indicators of return on investment (ROI), we can gain a deeper understanding of the impact of such programmes, which are part of a participatory process.

Research purpose: This study aimed to address a significant gap in the evaluation of EWPs in water utility organisations. We involved a panel of experts familiar with the organisation's dynamics and internal processes in creating a unique framework of variables and indicators for evaluating ROI.

Motivation for the study: There is little evidence of such programmes being evaluated at the local level, including within water utility organisations. Few studies focus on developing universally applicable ROI tools to measure the cost-effectiveness and social contribution of these programmes.

Research approach/design and method: The study used a qualitative approach and employed the rigorous and widely respected Delphi technique to obtain consensus from a panel of experts.

Main findings: The panel of experts reached a consensus on the qualitative and quantitative variables to include in a framework for evaluating the ROI of EWPs.

Practical/managerial implications: The study found that determining the ROI of EWPs can be challenging as programmes often focus on the human aspects of organisations and less on cost factors. However, the study demonstrated the essential need for organisations to use a combination of subjective and objective indicators to evaluate the effects of EWPs, thereby enhancing their overall effectiveness.

Contribution/value added: The study provides insights on subjective indicators reflecting non-monetary benefits and objective indicators reflecting cost factors.

Keywords: employee wellness programme; return on investment; Delphi study; indicators; cost-effectiveness assessment; programme impact; monitoring and evaluation; productivity.

Introduction

Many organisations, including water utility companies, have implemented Employee Wellness Programmes (EWPs). These programmes are defined in various ways by employers. But for the purpose of this study, an EWP will be considered as a structured, employer-sponsored programme aimed at assisting employees (and at times, their families) in adopting and maintaining behaviours that mitigate health risks, enhance the quality of life, improve personal effectiveness and contribute to the organisation's productivity (Berry et al., 2010, p. 4). These programmes are tailored to each organisation's goals, objectives and preferences, generally to address human behavioural concerns impacting organisational performance and health promotion.

Measuring the impact of EWP is critical in monitoring and evaluating the implementation of these programmes to establish the extent to which these interventions meet the organisational health and wellness objectives. The Employee Assistance Professional Association of South Africa (EAPA-SA) emphasises that the effectiveness of EWPs should be continually monitored and evaluated to ensure that they add value to the organisation and its beneficiaries. According to Burke and Richardsen (2013, p. 298) and EAPA-SA (2015, p. 23), criteria used to evaluate EWPs include process, outcome and impact evaluations that have to do with reaching health and

wellness outcomes. Limited research in South Africa focusses on the programme's value for the organisation, referred to as the return on investment (ROI). Developing universally applicable ROI tools for measuring the cost-effectiveness and social contribution of EWPs, particularly within the water utility sector, is crucial (EAPA-SA, 2019, p. 2; Sieberhagen et al., 2011, p. 13; Vermeulen, 2021, p. 303). Amid a substantial history of wellness programme implementation in local water utility organisations, there is little evidence of the programmes being evaluated, let alone measuring organisational indicators such as ROI. Existing reports on EWPs within the mentioned organisations indicate that there is no ROI framework in place for consistently measuring and quantifying the programme's impact.

Information gathered from personnel at water utility organisations suggests that the EWP receives limited funding, indicating a lack of executive support for the programme. As a result, managers find it challenging to demonstrate the impact and value of the EWP to the organisation. A study by Jacobson et al. (2011, p. 45) found a historical difficulty in converting client case data from case files from EWPs into meaningful statistics that can effectively showcase the value and outcomes of the programme's direct services. It is crucial to establish measurable outcomes and emphasise the value of EWP services, especially in today's challenging economic climate (Servizio, 2018).

The study aims to identify and develop a framework of organisational indicators and metrics for evaluating the EWP impact and worth to the organisation. Evaluating the impact of the EWP using this framework will assist programme managers in establishing baseline data for ongoing evaluations. This will justify and drive requests for budget increases to cover necessary interventions aimed at improving employees' health and well-being. It will also help in investing in interventions that bring higher returns and demonstrate the programme's value to the organisation.

Goal and objectives

The study's goal was to compile a framework of indicators for evaluating ROI in water utility organisations using a Delphi technique. The research question is what combination of indicators and variables can be used in this case to measure the impact and ROI of EWPs effectively?

Literature review

Mattke et al. (2013, p. 2) and the ILO (2013, p. 3) contend that there is not a formally or globally accepted definition of EWPs. Various authors have formulated their definitions for EWPs, including employer-sponsored programmes to support employees (others include families). The aim of EWPs is to improve employee well-being or quality of life through various interventions impacting the organisation's productivity (Berry et al., 2010, p. 4; Burke & Richardsen, 2013, p. 297).

Sieberhagen et al. (2011, p. 3) define EWPs within the local context as intervention strategies intended to promote the

well-being of employees. These strategies could be both curative and preventative. Reasons for implementing such programmes differ from employer to employer. The common goal of EWPs is to ensure that employees' problems do not impact organisational performance or productivity and are resolved effectively (Maiden, 1992). Multinational companies conducting business in South Africa have included EWPs in their human capital plans to support individual and company performance goals (Sackney et al., 2012, p. 42). The South African Government endorsed the health and wellness management framework through the Department of Public Services and Administration to support employees in their wellness journey and improve service delivery (DPSA, 2014, pp. 2–4). This framework has been cascaded to municipalities nationally for adoption. Therefore, the goals of EWPs can be implemented in any organisation regardless of the sector.

Yeung and Johnston (2016, p. 17) indicate that wellness at work must be viewed from a broader perspective, given the changing trends in the future workplace. To prepare for the future of work and to harness the potential of wellness, they propose a new vision for wellness at work, which is:

Wellness at work is the right to work healthily, motivating and illuminating. Workers, managers and business owners should work to improve wellness and the well-being of others (Chenoweth, 2011, p. 9; Yeung & Johnston, 2016, p. 4). Employee Wellness Program should form part of the organisation's strategy, mission and objective. Notwithstanding, several organisations still view EWPs as non-essential and nice to have. Chenoweth (2011, pp. 9–10) asserts that EWPs must be an intrinsic part of the organisational culture to have an impact and succeed.

According to Sieberhagen et al. (2009, p. 18), employee wellness is not defined in South African labour law, and no specific legislation or management standard regulates the implementation of EWPs in South Africa. The authors acknowledge that the following legislations influence employee's health and wellness by protecting them: *the Constitution of the Republic of South Africa, the Occupational Health and Safety Act (Act of 1993), the Labour Relations Act, the Basic Conditions of Employment Act, the Compensation for Occupational Diseases and Injuries Act, the Unemployment Insurance Act, the Employment Equity Act and the Skills Development Act*. Employee Wellness Programs are widely used in the human resources (HR) discipline in most South African organisations. Employee Wellness Programmes have become a priority for modern organisations because of the strength they add to the bottom line by improving productivity, improving employees' health and well-being, reducing medical spending and impacting the talent management strategy (Goetzel, 2020, p. 442; Matlhape, 2003, p. 35; Surujlal & Vyas-Doorgapersad, 2015, pp. 6686–6687).

Employee Wellness Programmes allow organisations to have a competitive advantage and survive the pressures of globalisation (Chenoweth, 2011, p. 1). Comprehensive and

practical EWPs ensure that employees perform at their maximum level (Soldano, 2016, p. 285).

The latest study conducted by Patel et al. (2013, p. 3) on the campaign about the healthiest companies' index to promote wellness programmes in South Africa indicates that because of sparse financial and health improvement outcomes, data, public knowledge and support for workplace health promotion in South Africa is limited. Programmes common among employers include training in occupational safety, employee assistance programmes, and screening and counselling for employees living with human immunodeficiency virus (HIV).

According to the National Consistent Collection of Data (NCCD) results, South Africa experiences an epidemic of non-communicable chronic diseases linked to mostly individual lifestyles. Relative to baseline values in 1997, NCCD showed a fivefold increase in 2004 and 2015. After HIV and AIDS, lifestyle-related chronic diseases are the leading causes of death and disability in South Africa. This evidence is recorded in all sections of the population but is more evident in the employed individuals who are members of medical schemes (Patel et al., 2013, p. 28).

In South Africa, the South African Board for People Practices (SABPP) and EAPA-SA have taken the initiative to elevate the wellness debate regarding the importance of Employee Assistance Programmes (EAPs) and EWPs in organisations. This has resulted in developing EAP and wellness standards to ensure organisations continue implementing and prioritising wellness. The SABPP identified EWPs as one of the 13 HR standards to address safety, health and wellness-related issues and tasks to form a comprehensive wellness strategy (Abbott & Meyer, 2015, p. 28). In this respect, it is critical to incorporate EWPs into the HR strategy. Consequently, EAPA-SA (2015) has developed EAP standards as guidelines for best practices for developing and implementing EAPs. This accomplishment promotes and endorses EAPs and EWPs as strategic tools for organisations to deal with productivity issues caused by personal or worker-related behavioural problems. However, both SABPP and EAPA-SA are not statutory regulated, and membership is voluntary and non-mandatory. To this end, organisations may or may not choose to implement the proposed standards. Further, the Department of Labour has not adopted EWP national policy or strategy, which may cause organisations to either discredit or refuse to enact these programmes (Sieberhagen et al., 2009, p. 24). This may be the rationale behind the inconsistencies in how organisations define, design and fund their EWPs or EAPs including evaluating their impact.

Against the backdrop of a large-scale EWP implementation such as at the water utilities organisations, there needs to be more evidence to suggest that the impact of these programmes is well understood and sufficiently documented (Sieberhagen et al., 2011, pp. 7–8; Yeung & Johnston, 2016, p. 3). This can mainly be attributed to very few publications within the EWP field dealing with the development of universally applicable

ROI tools that measure these programmes' cost-effectiveness and social contribution (EAPA-SA, 2019, p. 1). Workplace wellness scholars, such as Keet and Terblanche (2013, p. 193) and Orren and Terblanche (2009, pp. 51–56), maintain that the shortage of information in South Africa to understand and measure the social and economic impact of EWPs necessitates further research. This is because most available data on EWP ROI relates explicitly to the context of the United States of America (US) and Europe and mainly focusses on reducing healthcare costs (ILO, 2013, p. 7; Marshall, 2020, p. 223).

Preuss (2016, p. 2) defines ROI as a financial measure that has long been employed in the business world to monitor performance. Return on investment can be calculated by dividing the benefit (return) of an investment by the cost of the investment and expressing the result as a percentage or a ratio (Investopedia, 2015). To calculate ROI, dividing the benefit (return) of an investment by the cost of the investment provides a result expressed as a percentage or a ratio (Preuss, 2016, p. 2). Pereira et al. (2019) indicate that ROI can be defined as a performance concept in any investment and is considered as resources implanted to achieve benefits over time. The ROI becomes a cost-to-benefit ratio. Consequently, it can help establish whether positive or negative returns were brought about by investment in the organisation.

Although ROI sounds like a feasible consideration for the measurement of an asset such as an EWP, the calculation is not simple, as EWPs are not income-generating assets using significant plant and equipment, though their operation indirectly supplements the organisation's operational ability, profitability and management performance (Seal et al., 2019, p. 286). In dealing with assets such as EWPs, management needs to quantify the EWP contribution in some way to derive the relative ROI, a necessary task in view of management's tools for controlling ROI, which are limited to increasing revenue, reducing expenses or reducing operating assets, the latter two options leading to the EWPs vulnerability. The difficulty for EWPs is to continue demonstrating the asset's worth to the company, despite it not directly contributing to profits. The EWP can easily become an ongoing financial liability that must be financed despite upswings and downswings in organisational business cycles (Brigham et al., 2019, p. 87). These considerations justify the current study's contribution to expanding relevant knowledge in the EWP sector.

Research method

Research design

A Delphi technique using mixed methods design of both qualitative and quantitative approaches to collect data was implemented in this study. Schneider et al. (2014, p. 238) use (Tashakkori & Cresswell, 2007) definition of mixed methods as 'a research in which the investigator collects and analyse data, integrates findings and draws inferences using both qualitative and quantitative approach in a single study'. A combination of semi-structured interviews, questionnaire completion and focus group data collection methods was

followed to identify and refine possible ROI indicators relevant to the target context (Creswell & Creswell, 2018, p. 295; Junger et al., 2017, p. 11; Rowe & Wright, 2019, p. 4).

Schneider et al. (2014, pp. 247–248) consider a Delphi technique as a mixed method because data collected during the first round collects qualitative data needed initially to provide the richness of data necessary to formulate subsequent focussed questions or statements. Qualitative content and thematic analysis processes of the collected first-round data are used as a basis to synthesise responses for each survey round.

The goal is often to extract a fairly ‘narrow’ consensus on the investigated topic and usually requires a number of similarly structured Likert-style questionnaire rounds to help break the categories down into a manageable number, and this follows the quantitative approach. The lowest scoring questions are removed, whereas the highest scores are kept for the following rounds (Brady, 2015, p. 4; Fefer et al., 2016, p. 3; Powell, 2003; Schneider et al., 2014, p. 248).

The Delphi technique was chosen for this study because there is minimal historical data regarding the water utility organisations’ evaluation framework or indicators that can be used to evaluate the impact of EWP. The Delphi method was a dynamic approach for generating context-specific indicators for evaluating EWPs in water utility organisations.

Research method

The study was implemented at water utility organisations. Permission was requested to gain access to four water utility organisations as sampled populations and set up the Delphi panel members. Purposive, non-probability sampling was used to select the panel members (Strydom & Delpont, as cited in De Vos et al., 2011, p. 392; Neuman, 2014, p. 273).

The members’ recruitment criteria were pre-determined (Avella, 2016, p. 309; Brady, 2015, p. 3; Schmalz et al., 2021, p. 4). The set inclusion criteria were that panel members should be professionals responsible for developing, implementing and managing EWP strategies and policies and financial professionals responsible for financial planning or budget approvals of an organisation’s EWP. In addition, the accounts managers responsible for the external wellness service providers that the sampled organisations contracted to provide specific wellness services were also recruited as professionals who generally assist the sampled organisations in designing and costing the programme.

The panel members (see Table 1) were recruited through an email advert indicating the study’s purpose, the procedure to be used, explained voluntary participation, benefits and remuneration and confidentiality during data collection. The advert also included the relevant ethics approval letter and permission letters from the target organisation. Respondents interested in participating in the study responded by email or calling the researcher, after which the informed consent was concluded and a meeting arranged.

TABLE 1: Demographic information of panel members.

Panel member	Age (years)	Gender	Qualifications	Position and experience
1.	49	Male	MC	Financial, Economic Planner
2.	33	Male	CA	Acting Treasury Manager, Financial -Planner
3.	60	Female	Psychology, MBA	HR Executive
4.	37	Female	Honours BCom	Management Accountant
5.	39	Male	Honours SW	Manager EWP
6.	52	Female	OHN	Professional EWP
7.	39	Female	MPsy	Accounts Manager, external Provider
8.	27	Male	DHR	Professional EWP
9.	55	Female	Masters Industrial Psychology	HR Manager
10.	32	Female	MBA	National clients relations accounts manager
11.	40	Male	LLB, B Tech HR	Acting Corporate Services Executive
12.	41	Male	B Com	Financial Planner

B Tech, Bachelor of Technology; B Com, Bachelor of Commerce; CA, Chartered Accountant; DHR, Diploma in Human Resources; EWP, Employee Wellness Programme; HR, Human Resources; LLB, Bachelor of Legislative Law; MBA, Master’s in business administration; MC, Masters in Commerce; OHN, Occupational Health Nursing; SW, Social Work.

Data collection

In round one, data were collected through Microsoft Teams using semi-structured interviews. The interviews were recorded and transcribed following Kuckartz’s rules for transcription, which focusses on content rather than subjective views or perceptions. The researcher used Microsoft Spreadsheet to capture and code the data guide (Strydom & Delpont, as cited in Cresswell, 2014, pp. 173–176; De Vos et al., 2011, pp. 397–423).

During round two, data were collected through questionnaires created using Google Forms. The questions compiled were the consolidated findings from the semi-structured interviews where panel members had to re-evaluate and iterate their initial responses from the first round. A five-point Likert ordinal scale and multiple choice were used, as the scale seemed to provide an adequate answer range. The Likert scale used the following definition: 1 = strongly inappropriate, 2 = somewhat inappropriate, 3 = neutral, 4 = somewhat appropriate and 5 = strongly appropriate. The study defined the average response value by using Equation 1:

$$Average = \frac{\sum^n \text{response index}}{n} \quad [\text{Eqn 1}]$$

Equation 2 converted the average into a percentage:

$$Percentage = \frac{Average}{5} \quad [\text{Eqn 2}]$$

representing the maximum numerical value of the scale.

The panel members received an email with a brief background and instructions on completing the questionnaire.

In the final round, panel members participated in an online focus group discussion to re-evaluate their responses and supplement the quantitative survey with qualitative insights

(Barbour, as cited in Brown, 2018, pp. 99–100). The discussions took place using Microsoft Teams. The responses from the second round were combined into a report, which required panel members to engage with the evaluation results. They were tasked with ranking and prioritising the indicators, re-evaluating them and giving final judgements on how these variables reflected ROI. Panel members were not permitted to use their cameras or introduce themselves during the session to ensure anonymity. Instead, they used the chat box to rate the priority indicators, ensuring that members did not influence each other's rankings. The focus group discussions were highly structured, focussing on controlled feedback from the second round (Greef in Brown, 2018, pp. 99–100; De Vos et al., 2011, pp. 368–369; Neuman, 2014, p. 470). The reason for convening all members in one group was to expedite the response process, as it took longer for them to complete the questionnaire individually during the second round.

Data analysis

Using each transcript as the unit of analysis, we qualitatively analysed the data using content analysis and an interpretive perspective. We employed open coding to group similar items and provide one universal description to develop themes (Schunick et al. as cited in De Vos et al., 2011, pp. 410–415; Lee et al., 2021, p. 304; Schmalz et al., 2021, pp. 8–9). During this round, we used quantitative analysis to evaluate the feedback gathered from the completed questionnaires. Descriptive statistics for this round were generated using the Statistical Package for the Social Sciences (SPSS) (Creswell & Creswell, 2018, p. 255). As no new data were collected during the third round, consensus was determined using qualitative thematic analysis and statistical analysis, following the Delphi technique rules (Brady, 2015, p. 4; Strydom & Delpert as cited in Creswell & Creswell, 2018, pp. 303–305; De Vos et al., 2011, p. 477; Schmalz et al., 2021, p. 9).

Ethical considerations

For the safety of the participants, their confidentiality, anonymity and privacy were maintained throughout the data collection process. No personal names were used, ensuring that participants remained anonymous. No personal details were shared with other members, and the teams meeting was kept confidential. Participants were only informed about the limited confidentiality of the focus group setting during the focus group session, and their participation was confirmed at that time (Avella, 2016, p. 309; Brady, 2015, p. 2; Skinner et al, 2015, p. 33). Participants were free to withdraw at any time (Neuman, 2014, pp. 146–148; Saunders et al., 2018, pp. 257–259). Ethics approval was obtained from the North-West University Health Sciences ethics committee (ref. no. NWU-02070-20-A1).

Utmost care was taken to ensure a diverse panel based on different ages, genders, positions and companies. Additionally, two EWP professionals from outside the water utility organisations were recruited as participants (Skinner et al., 2015, pp. 32–33).

A pilot study was conducted to test the interview schedule guide in preparation for round one to ensure understanding and appropriate responses by the panel members. The pilot study included three professionals who were members of EAPA-SA. The guide was then refined and one more question was added (Neuman, 2014, p. 320; Linstone & Turoff, as cited in Brady, 2015, p. 3).

Results

The study compiled a set of indicators to evaluate the ROI of EWPs at water utility organisations using input from a panel of experts. Table 4 shows the response rates for data collection in each round. We had a 100% response rate in the first round (interviews). However, there was a drop in the number of participants during the second round (iterative questionnaires) at 75% and the third round (rating questionnaires) at 67%. Some members who did not respond in the second round did participate in the third round. We maintained the selection criteria for respondents from both the human resources and/ or EWP and finance fields in all three rounds.

In the study, certain outcomes were identified after the panel members agreed on the definition of the ROI of EWPs and the framework of qualitative and quantitative indicators to be measured. However, there was no consensus reached on the utilisation rate of the wellness services. In the second round, panel members were also asked to specify the possible scales that can be used for measuring the proposed indicators.

Round 1

Definition of return on investment

The panel members proposed the following definitions of ROI:

Definition 1:

'Return on benefits improved value derived from the money you have spent on the project or programme. I was expecting a number.' (Panel member 2 & Panel member 11)

Definition 2:

'Money worth spending and getting something in return.' (Panel member 3 & Panel member 6)

Definition 3:

'Recovered money spent on a project and/or programme over time, indicating the rand value.' (Panel member 5, Panel member 10 & Panel member 12)

Definition 4:

'Qualitative goal and value achieved on programmes offered by the organisation.' (Panel member 1, Panel member 7 and Panel member 9)

Definition 5:

'Seeing results or impact, whether qualitative [*i.e.*, improved levels of engagements] or objective [*i.e.*, profitability and/or leave costs etc.], on the money spent on EWP.' (Panel member 4 & Panel member 8)

Panel members gave different meanings to the term ROI; however, after the third round, they all agreed on one term to be used.

The thematic findings focus on subjective individual and organisational benefits and indicators, and various cost reductions as objective financial indicators associated with the implementation of EWPs.

Theme 1: Improved well-being: Improved employee well-being was identified as a critical indicator in the framework. The dimensions of well-being identified were: physical, social, occupational, environmental, psychological and/or mental, financial and spiritual well-being. The panel shared the following viewpoints:

'I think that having to have an intervention targeted to specific well-being dimension to make sure that employees are completely well, e.g., for physical wellness EWP to make provision for nutrition workshops, physical exercise interventions.' (Panel member 1)

'My view is that EWP contributes highly to the psychological well-being of employees as most focus is on counselling interventions. Monitoring the psychological well-being is improving could be an indicator that EWP is making an impact on the organisation.' (Panel member 4)

'I think EWP can set up quarterly scorecards on interventions addressing each wellness dimension, e.g., quarter one can focus on physical well-being, and interventions like health risk assessments can be arranged.' (Panel member 11)

Theme 2: Improved personal growth: The panel's opinion was that EWP addresses behavioural issues or habits that impact employees' lives. Health risk assessments, for example, could be used not only to facilitate change in human behaviour but as an indicator of the reduction in risk achieved through the EWP that could be confirmed by measures of change, personal growth or improvement.

Theme 3: Improved work-life balance: Some of the panel members brought up the following views:

'The impact of COVID-19 had on employees, especially during the lockdown, made it difficult to balance work and family life.' (Panel member 3)

'There was a new norm of working where many employees had to work remotely whilst also having to isolate and care for themselves and their families when they tested COVID positive.' (Panel member 1)

'EWPs had a big role to play during COVID-19 and were expected to find new ways of supporting employees away from the workplace.' (Panel member 7)

Identifying ways to measure work-life balance could reflect a healthy workforce, which in turn could indicate a positive return to the organisation.

Theme 4: Improved work cohesion: Four sub-themes were identified under the above-mentioned theme: improved social cohesion, adaptation to change, improved levels of work engagement, and improved work morale. The panel noted that employees are social beings and that, given the

fact that they work in environments where they collaborate with others, working in teams and forming healthy relationships with their colleagues is crucial. The panel's views were:

'If the employee is not socially well or have other issues, he or she may affect the team cohesion, the performance of the team and other.' (Panel member 4)

'EWP can ensure that there are healthy teams as most employees work in teams and they must get along, the line manager must also ensure that they care about their employees and as a result this will improve employee morale and productivity.' (Panel member 5)

'EWP can impact on the issues of change and work cohesion in the organisations. Change affect employees psychologically and emotion and can sometimes disrupt work cohesion. Employees and teams can be supported to adapt and cope with changes in the organisation positively.' (Panel member 11)

'One of the impacts of EWP is to improve employee morale in various ways. Some of the members indicated that the fact that the organisation make provision of the programme, employees feels that the organisation cares for them.' (Panel member 9)

'Wellness should play a big role in improving the levels of employee engagement. I think we can be able to measure how engaged employees are in terms of doing their work and that automatically increases productivity.' (Panel member 3)

Measures such as work engagement could be an effective indicator of cohesion.

Theme 5: COVID-19 and improved resilience: Most panel members associated the value of the EWP with the actions taken during the coronavirus disease 2019 (COVID-19) and the support that employees needed. The panel's views were:

'The counselling services through the external service provider helped us greatly during COVID-19. We could talk to someone over the phone.' (Panel member 9)

'COVID-19 set new parameters for organisations [for example] employees had to adjust to the new norm and start working from home.' (Panel member 10)

For them, the EWPs prompt response rate with telephonic counselling reflected the programme's efficiency.

Theme 6: Wellness ratings/international benchmarking: Two of the panel members emphasised benchmarking whereby all organisations should be rated and compared in terms of their services to their employees. The views of the panel were:

'There needs to be a rating system of what makes the organisation an employer of choice and that some of sort of standards need to be set in terms of how the world-class EWP should look like.' (Panel member 10)

'For example, questions such as does your leadership provide strategic support for the programme, is there enough budget provided to ensure proper implementation, is there enough human resources dedicated to the programme etc... Then a rating similar used in the credit ranking where statuses such as AAA, AA, Junk status can be used to rate the organisational EWP.' (Panel member 1)

Theme 7: Reduction of costs related to employee wellness programs: Four sub-themes rendered the objective indicators namely: reduced sick leave costs, reduced presenteeism costs, reduced medical aid costs and reduced human resource costs. The following views came up:

'In my opinion, leave is money, and the EWP can assist employees absent from work because of sick leave to get better and return to work.' (Panel member 12)

'Another impact EWP has is to reduce the costs related to presenteeism. For example, employees with financial wellness problems who would constantly be on the phone with creditors to try and resolve debts.' (Panel member 7)

'I feel that there are human resources-related costs, such as saving on recruitment, training, and salary costs. If employees are well, then there are savings in salary in that there is the justification of hired labour in the sense that employees will be doing what they are supposed to do. Instead of me going to hire extra resources because the employee cannot do their work.' (Panel member 4)

'There are also savings in terms of medical aid costs. The health risk assessment serves as a preventative measure where employees can identify their health challenges earlier so that they can get the necessary attention they require in order to curb the possibilities of absenteeism.' (Panel member 10)

Theme 8: Improved productivity: The panel suggested measuring EWP impact on productivity improvement though they were not clear on how this could be measured:

'If we can be able to measure that after using EWP, there is improvement in terms of productivity, e.g. what took an employee x 10 hours to do is now taking 6 hours; therefore, there is a saving of 4 hours and additional work can be allocated.' (Panel member 4)

'Once I refer the employee for assistance, I should not worry about the employee anymore as they are in good hands, and then I can focus on other work-related matters and the productivity of my department.' (Panel member 11)

Round 2

The round two findings confirmed both sets of indicators, but panellists were uncertain how to quantify economic and productivity returns using the subjective indicators.

Table 2 and Table 3 indicate the members' responses as calculated using the mean and the consensus percentage from the highest to the lowest.

Qualitative (subjective indicators)

The range of subjective, quality life indicators could all be measured using periodic staff surveys or EWP after-service surveying.

Quantitative financial (objective indicators)

The objective or financial indicators in Table 3 would be compiled from budget and expenditure metrics, personnel records and staff health records.

TABLE 2: Panel member consensus about qualitative subjective indicators.

Indicators identified	Mean	Consensus (%)
Improved overall well-being levels of employees	4.55	91.11
Improved physical well-being	4.33	86.67
Improved psychological well-being	4.55	91.11
Improved financial well-being	4.22	84.44
Improved social well-being	4.33	86.67
Improved occupational well-being	4.33	86.67
Improved environmental well-being	4.00	80.00
Improved levels of engagement	4.44	88.89
Improved employee morale	4.55	91.11
Healthy team dynamics and social cohesion	4.67	93.33
Job satisfaction	4.22	88.44
Improved work-life balance	4.55	91.11
Adaptation to change and work cohesion	4.11	82.22
COVID-19 and resilience	3.78	75.56
Wellness ratings and international benchmarking	3.67	73.33

COVID-19, coronavirus disease 2019.

TABLE 3: Results of panel members' consensus with objective financial indicators.

Financial indicators	Mean	Consensus (%)
Productivity costs	4.44	88.89
Reduced medical aid costs	4.00	80.00
Reduced presenteeism costs	4.00	80.00
Reduced sick leave	3.89	77.78
Salary justification costs, employees doing what they are supposed to be doing	3.89	77.78
Human resource costs such as recruitment, training, etc.	3.78	75.56

etc., etcetera.

Round 3

Although consensus emerged during the second round, panellists could adjust their rankings based on comments and suggestions from their peers, which led to improved consensus. The discussion resulted in a reduction of indicators from thirteen (13) to eight (8) in the final list, and a reduction in the objective indicators from six (6) to four (4).

Definition of consensus

Consensus can range between 51% and 80% (Ogbeifun et al., 2016, p. 2006), while Gallotta et al. (2018, p. 232) brackets consensus as the general agreement or majority opinion equal to or greater than one-half (more than 50%), three-fifths (60%), two-thirds (66%) or three-quarters (75%).

Definition of return on investment of employee wellness programme

After a robust discussion, panel members agreed that the final definition of ROI to be seeing the measurement of tangible results or impact of the EWP, whether qualitative and/or subjective (i.e. improved levels of engagements) or quantitative/objective (i.e. profitability/leave costs, etc.).

In this study, it was notable that the panel members replaced the word 'returns' with 'results' or 'impact' compared to the above financial definition of returns.

The panel argued that EWPs focussed on assisting human beings; therefore, the concept of ROI would differ from that of project implementation. They further mentioned in the

TABLE 4: Qualitative indicators: Subjective individual and organisational benefits.

Theme	Sub-theme
Individual benefits	
1. Improved well-being	1.1. Improved psychological well-being 1.2. Improved physical well-being 1.3. Improved social well-being 1.4. Improved occupational well-being 1.5. Improved environmental well-being 1.6. Improved financial well-being
2. Personal growth	2.1. Personal change and improvement
3. Improved work-life balance	
Organisational benefits	
4. Improved work cohesion	4.1. Improved social cohesion 4.2. Adaptation to change 4.3. Improved levels of work engagements 4.4. Improved work morale
5. COVID-19 and improved resilience	
6. Wellness ratings/international benchmarking	
Financial indicators	
7. Reduction of costs related to EWP	7.1. Reduced sick leave costs 7.2. Reduced presenteeism costs 7.3. Reduced medical aid costs 7.4. Reduced human resource costs
8. Improved productivity	

EWP, Employee Wellness Program; COVID-19, coronavirus disease 2019.

Delphi round 3 that calculating every impact derived from the EWP was impossible. Table 5 presents the panel's final list of indicators.

Primarily, the listed objective indicators reflect the potential positive impact of EWPs on various cost factors and ROI assessments that organisations can generate. For example, the reduced sick leave and medical aid costs suggest that the EWP contributes to improved employee physical and mental well-being of employees. This means that employees will take fewer sick days, reducing costs related to covering their absence or hiring temporary replacements. The stated reduced costs are, however, associated with employee sick leave and healthcare expenses and not any other absences, such as study leave, maternity leave or even annual leave.

In addition, this also has positive spin-offs for other HR costs related to recruitment and training of temporary replacements. The productivity costs suggest that the EWP helps employees improve their productivity levels, resulting in fewer disruptions and inefficiencies that could lead to financial losses for organisations.

Utilisation rate

Members were asked two questions regarding programme utilisation as per Figure 1 and Figure 2, respectively. The panel argued that utilising EWPs depends on factors like leadership commitment, the created organisational wellness culture, how well the programme was marketed and accepted by the employees and the available financial resources.

TABLE 5: Final consensus indicators as concluded by panel members.

Final indicators	Descriptions
Improved psychological/mental well-being.	Psychological stability of employees and the organisation.
Improved social well-being.	Healthy relationships between line managers and employees and between colleagues.
Improved environmental well-being.	Environment to include both workplace and home. The environment both at work and home must be conducive to enhancing employee well-being.
Improved physical well-being.	Employees exercising at least 3x a week and doing health risk assessments, etc.
Improved work-life balance	Balance between work and personal commitments and the appropriateness of the workplace.
Improved employee engagement	Being actively involved and engaged and committed to own well-being and the organisation.
Improved resilience	Being able to come back and continue after a problem, a pandemic or sickness.
Improved financial well-being.	Ability to manage own personal finances.
Wellness ratings/benchmarking	Giving ratings to employers who provide EWP by developing the criteria for evaluation. Benchmarking with other organisations in terms of best practices.
Objective financial indicators	Description
Reduced absenteeism costs	Focus on absenteeism costs that are a result of EWP interventions.
Reduced presenteeism costs	Presenteeism costs savings that are a result of EWP interventions.
Productivity costs	Productivity costs that are a result of EWP interventions.
Reduced medical costs	Medical cost savings that are a result of EWP interventions.

EWP, Employee Wellness Programs; etc., etcetera.

Sieberhagen et al. (2011, p. 9), who studied the utilisation rate of EWPs, claim that the management of EWPs in South Africa differs according to organisations. For example, the authors submit that some organisations' participation rates are 20% and below, others are between 30% and 50% and a few are 60% and higher. They attribute the utilisation to the following factors: organisations must conduct a proper needs assessment; interventions must be done timeously after the assessments and not be delayed and facilitation of proper stakeholder consultations.

Figure 1 and Figure 2 represent the views of the panel members on the utilisation rate. Most panel members (44%, however, not meeting the consensus criteria) are of the view that the utilisation rate for both counselling and preventative services should be between 71% and 80%.

However, judging from the literature and the panel members' views (Figure 1 and Figure 2), no universally agreed-upon utilisation standard applies to all EWPs as this varies from organisation to organisation. Notwithstanding this, some authors believe there is a correlation between high utilisation rate and high ROI of EWPs (Mattke et al., 2013, p. 53).

It is important to recognise that employee participation in wellness programmes depends on individual needs, so expecting 100% participation is unrealistic. Instead, it is better to establish an acceptable utilisation rate based on the programme's specific context and goals, as well as its overall impact on employee well-being and engagement.

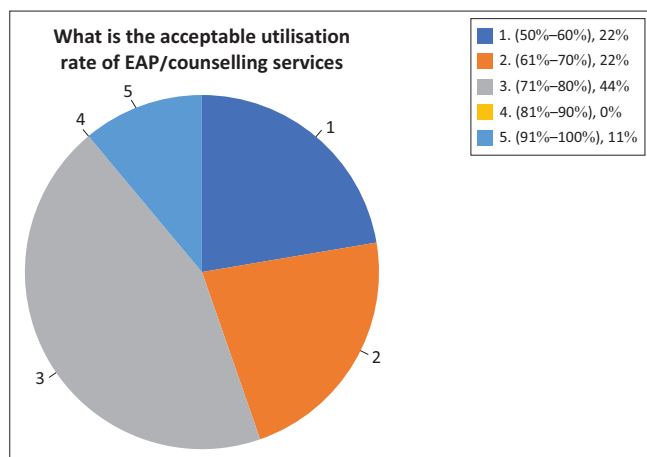


FIGURE 1: Utilisation rate of counselling services.

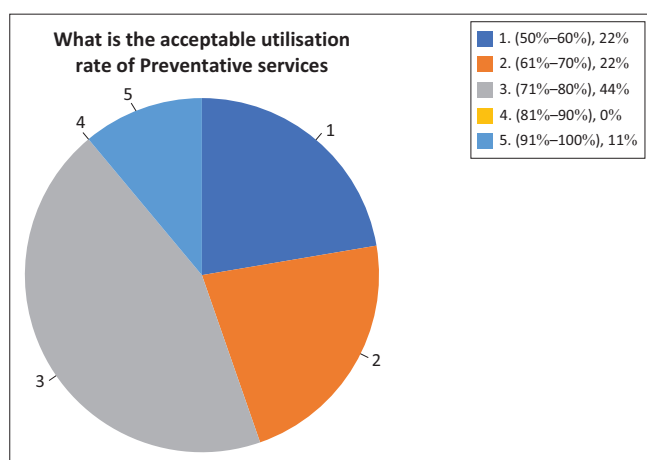


FIGURE 2: Utilisation rate of preventative services.

Discussion

This study is an initial step towards creating a framework of indicators for measuring the ROI in water utility companies. The findings offer valuable insights into the impact and ROI of EWPs in South Africa, but they should be seen as a starting point for future research. Using the Delphi method was effective in this research and revealed gaps in South African studies regarding its use in the field of EWPs. The researcher suggests using the Delphi method to develop national policies or strategies for EWPs in South Africa and to support the legislative efforts of the Department of Labour. A significant gap was found between EWP budgeting and programme design processes within human resources and finance, which may lead to challenges in acquiring sufficient financial resources. Therefore, achieving the identified EWP indicators and ROI can be difficult without adequate resources. The study also recommends conducting a systematic review of the ROI of EWPs within the South African context to provide a comprehensive overview of available local literature and methodologies used to determine the ROI of EWPs. Lastly, the study suggests that water utility organisations establish a database to serve as a baseline for assessing the long-term impact of EWPs and to test the identified indicators to set

acceptable standards in terms of measurable indicators and the acceptable utilisation rate.

Limitations

The study encountered some limitations and lessons learned during the data collection phase. The panel was mainly composed of professionals from the EWP field, which may have affected the diversity of perspectives. Additionally, some panel members dropped out or missed a round but returned later. To address this limitation, the study ensured that the selected criteria for having HR and finance expertise were maintained (Fefer et al., 2016, p. 5).

The Delphi study was found to be a time-consuming process. Conducting semi-structured interviews and completing questionnaires took longer because of the non-availability of some panel members, requiring multiple reminders. According to Schmalz et al. (2020, pp. 1–2), conducting a Delphi study can be slow in terms of receiving feedback from panel members. Therefore, it is important to plan an appropriate questionnaire distribution period to achieve a higher return rate. The project planning incorporated a sufficient time buffer for an extended data-gathering period.

While most Delphi studies rely solely on questionnaires for data collection, using interviews is uncommon. However, some studies have used interviews to inform questionnaire development (Breedvelt et al., 2021, pp. 1115–1116; Rowe & Wright, 2019, p. 4; Schmalz et al., 2020, pp. 4–5). This study employed a hybrid method of combining interviews and questionnaires for data collection. The researcher found interviews to be more effective in ensuring the participation of panel members, engagement and clarity on various issues (Grime & Wright, 2016, p. 5).

Conclusions

This study used the hybrid Delphi technique to collect data and establish consensus among the appointed EWP, HR and Finance panel members. The study reached the following outcomes: an agreed definition of ROI, the framework of indicators for evaluating ROI in water utility organisations looking at both subjective and objective indicators. The criteria to determine the consensus in the study was 75%. However, a consensus of 90% was reached, which exceeds what the literature states (Breedvelt et al., 2021, p. 1117; Hirschhorn, 2019, p. 310; Schmalz et al., 2021, pp. 8–9).

The study listed qualitative (subjective) indicators as improved well-being levels (that includes only five dimensions in the order of priority: improved psychological and/or mental well-being, improved social well-being, improved environmental well-being [both home and workplace], improved physical well-being, and improved financial well-being [the financial well-being did not reach 75% consensus]), improved work-life balance, improved

employee engagement and wellness benchmark ratings. The quantitative (objective) indicators agreed upon are absenteeism (sick leave) costs, presenteeism costs, productivity costs and medical aid costs. The study confirms comparable findings of most subjective indicators carried out in other studies (ILO, 2013, p. 3; Mattke et al., 2013, pp. 47–53). The subjective indicators not mentioned in the consulted literature are improved work-life balance, resilience and wellness benchmark ratings.

Various studies revealed similar results regarding objective indicator selection, whether focussing on one or two indicators. Goetzel (2015, pp. 927–928), Light et al. (2015, pp. 885–890) confirm the reduction of medical aid costs; Qaisar et al. (2018, pp. 113–114) and Song and Backer (2019, pp. 1497) improved productivity; Song and Baicker (2019, pp. 1498–1499) and Goetzel (2020, p. 441) reduced absenteeism and presenteeism. Panellists agreed that the role of EWPs in absenteeism or productivity costs is variable and should be weighted according to each organisation and adjusted following review. The unconfirmed objective indicators of this study were reduced turnover costs, reduced safety-related costs and compensation claims, as identified by Swayze et al. (2018, pp. 49–51).

Hence, while the water utility organisations lack specific indicators for measuring ROI of EWPs, the study revealed potential indicators like those identified in international literature. Although the identified indicators may be generic, local organisations could customise indicators around programme goals and objectives, while baseline measurements for the selected indicators can be used to assess their worth as measurement proxies along with objective indicators. The study has identified a range of potential indicators that can be tested and validated in further experimental validation studies.

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Competing interests

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Authors' contributions

M.L.M. was the researcher responsible for research methodology, collection of data, analysis and report writing. R.M.M. was responsible for co-supervision of the study, assisting with the administration and editing the article. W.R. was responsible for the supervision of the study as well as administration and editing of the article.

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Data availability

The data that support the findings of this study are available from the corresponding author, R.M.M, upon reasonable request.

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