

2024 NASPEs AWARD

Eugene H. Rooney, Jr. Award Nomination Innovative State Human Resource Management Program

Nominations from dues-paying states are considered for eligibility. Nominated leaders and programs should have a positive effect on the administration of state human resource programs. A state's central human resource department or line agency human resource operations may administer nominated programs.

Programs and projects must have been operational for at least six months and must be transferable to other states. Selection criteria are based on the questions asked on the award application. Included in this packet are the specific criteria for each award and their categories. Nominations are encouraged in all areas of human resource management administration.

PROGRAM INFORMATION

Program Title: Employee Financial Wellness State: PA

Contact Person: Timothy Pucino

Contact's Title: Administrative Officer

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NOMINATOR INFORMATION

Nominator: Jason Swarhout Title: Acting Deputy Secretary for Human Resources and Management

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DETAILS

The Commonwealth of Pennsylvania's Office of Administration (OA) launched a financial wellness program to assist employees through the various stages of their lives and careers. A key component of this program is regular in-person and online informational sessions with reputable experts. OA has leveraged innovative and customized approaches to increase webinar participation from several hundred employees in the first year to nearly 14,000 in 2023. They include targeted outreach to employees at key times in their career, such as when they are first hired and when they are approaching retirement; educating employees about the value of their benefits; and continuing to develop new educational content to maintain engagement. Understanding the value of their benefits contributes to employees' personal and financial wellbeing and strengthens recruitment and retention of the workforce.

Beginning in 2019, OA collaborated with the State Employees' Retirement System to provide free on-site educational sessions to employees in the Harrisburg area (largest concentration of employees) whose age and/or years of service suggested they were near retirement eligibility. These sessions averaged between 30 and 60 participants. The widespread adoption of online meeting technology during the COVID-19 pandemic presented an opportunity to significantly expand the program to employees beyond Harrisburg. In 2020, the program reached 2,386 participants in seven sessions. OA has also added new topics that appeal to a wider range of employees regardless of their age or length of service. In 2023, we offered 146 sessions that attracted nearly 14,000 participants.

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1. Please provide a brief description of this program.

Webinars and in-person sessions are conducted to assist employees at various stages of their lives and careers.

Each month, OA notifies employees hired in the prior month of upcoming webinars about their health plan and voluntary benefit options. This is in addition to the benefits information they receive during new hire onboarding. Employees close to retirement age receive information on webinars about their pension, deferred compensation, and retiree healthcare/Medicare benefits, and the steps leading up to retirement. Retirement sessions are delivered at different frequencies based on the topic, but there is at least one retirement related webinar each week.

[The webinars are recorded](#) (where permissible under regulatory requirements), distributed to the target audience, and made available as part of a robust Financial Wellness Guide on the [Commonwealth Employee Resource Center](#). OA also delivers live presentations and webinars on the value of Commonwealth's benefit package to support employee engagement and workforce retention.

2. How long has this program been operational (month and year)?

The program began in January 2019.

3. Why was this program created? (What problem[s] or issues does it address?)

Employees often have an incomplete or incorrect understanding of their benefits package, benefit choices, or the timing to complete the retirement process. These sessions provide clear and accurate information so employees can plan accordingly and make the best decisions

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regarding their benefits and retirement. Education on the value of the Commonwealth's benefits package also supports employee recruitment and retention.

4. Why is this program a new and creative method?

First, the educational content and announcements are tailored to specific employee groups. Employees are identified by factors such as retirement class, years until retirement eligibility, and date of hire to receive email notices about webinars relevant to them. Outside partners assist with providing webinars on topics that Commonwealth agencies cannot directly address, such as when licensing is required to give financial advice. Presentations to employees and management staff on the value of Commonwealth benefits are delivered at regular HR meetings, training facilities, and as otherwise requested. Providing education on the value of benefits has benefited recruiters in their interactions with job seekers and supports the retention of active employees. Microsoft Office tools are used to collect audience feedback and streamline registration. Attendees receive a survey after every webinar and the findings are shared with the presenters to ensure high quality content and clarity of communication. Registration has evolved into a self-registration process.

Finally, the program continues to leverage virtual presentation technology to reach employees. While the largest concentration of state employees is in the Harrisburg area, approximately three-quarters of the workforce is located in other areas of the state. Attendance for webinars reached over 7,000 in calendar year 2021 and nearly 14,000 in calendar year 2023. The virtual platform continues to be fully utilized, with in-person sessions resuming at the beginning of 2023.

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5. What was the program's startup costs? (Provide detailed information about specific purchases for this program, staffing needs and other expenditures, as well as existing materials, technology, and staff already in place.)

All presentations are delivered by state agencies and existing partners at no cost to the Commonwealth or employees. HR professionals who specialize in employee benefits have also created webinar content. OA leverages existing IT resources to host and record webinars and website content, communicate the availability of sessions to employees, and manage registration and attendee surveys.

6. What are the program's operational costs?

None.

7. How is this program funded?

There is no special funding for the Financial Wellness Program.

8. Did this program originate in your state?

9. Are you aware of similar programs in other states?

If yes, how does this program differ?

Many financial wellness programs are administered through a contract at the expense of the employer or leverage third parties who provide "free" presentations but who often have a sales motive, also. Using Commonwealth agencies and existing partners allows all sessions to be offered at no cost to OA or attendees and ensures that the information presented is factual and impartial.

10. How do you measure the success of this program?

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The effectiveness of the webinars is measured by attendance and surveys of attendees to obtain their feedback on the value of the content and suggestions for future sessions. Approximately 84% of survey respondents indicated that the sessions they attended met their expectations. The survey comments are positive overall, indicating the presentations are informative and helpful.

11. How has the program grown and/or changed since its inception?

The educational sessions began with free lunch-n-learn presentations on retirement planning topics and a website in 2019. At that time, employees showed interest with an attendance of 30 to 60 per session. Attendance increased to hundreds per session when the program changed to a virtual platform and reached almost 14,000 in calendar year 2023 (not including views of recordings). The variety of content has also continued to grow. HR professionals have added webinars on leave, benefit elections for new hires, and the action steps leading up to an employee's retirement. Presentations on the value of Commonwealth benefits were added in 2023 and are conducted both virtually and in-person. In-person sessions for other topics resumed in 2024 for the first time since the pandemic. Open enrollment messages now include webinars with a Q&A and video recordings on employee-facing websites. These initiatives help achieve clarity in messaging and support employees while they make complicated benefit elections. Finally, OA has made administrative improvements to registration and providing follow-up information such as handouts and contact information, with the manual tracking of email registrations and sending follow ups being replaced by a self-registration process with a calendar invite that includes all pertinent handouts, contact information, and additional online resources for attendees.

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