

2023 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: Financial Wellness State: PA

Contact Person: Timothy Pucino

Contact's Title: Administrative Officer

Agency: Office of Administration

Mailing Address: 108 Health and Welfare Bldg, 625 Forster Street, Harrisburg PA 17120

Telephone: 717-705-9358

E-mail: tpucino@pa.gov

NOMINATOR INFORMATION

Nominator: Jay Gasdaska Title: Acting Deputy Secretary for Human Resources and Management

State: PA Agency: Governor's Office of Administration

Telephone: 717.772.4237

E-mail: degan@pa.gov

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DETAILS

Recognizing the connection between an employee's sense of financial wellbeing with presenteeism and absenteeism, the Commonwealth of Pennsylvania's Bureau of Employee Benefits made a strategic decision to build a custom Financial Wellness Program (FWP). The program leverages internal resources and existing business partner relationships to deliver relevant and trustworthy information to employees at no cost to the Commonwealth.

The FWP started in 2019 by offering free on-site financial wellness educational sessions with the State Employees' Retirement System to employees in the Harrisburg area (largest concentration of employees) whose age and/or years of service suggested they were near retirement eligibility. Sessions averaged between 20 and 30 participants. There is also an employee [Financial Wellness website](#) to provide reliable information regarding their finances and guide them through life events such as marriage, the birth of a child, buying a home, etc. In 2020, the FWP expanded through partnerships with the Pennsylvania Treasury Department and Department of Banking and Securities to expand the topics offered to employees and increase the frequency of events. The onset of the COVID-19 pandemic also saw a transition to virtual sessions. In 2020, there were seven sessions with 2,386 participants. The increased participation was a direct result of our virtual platform, which allowed us to reach the entire workforce, and the addition of new topics that appealed to a wider range of employees regardless of their age or length of service. The program continues to grow and evolve as more topics are introduced. In 2022, we held 120 sessions with nearly 12,000 participants.

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1. Please provide a brief description of this program.

The Commonwealth of Pennsylvania's Financial Wellness Program (FWP) uses partnerships with state agencies and business partners to provide webinars on financial topics, ensuring employees have access to useful information from trustworthy sources. Commonwealth agencies whose mission includes financial literacy for the public tailor their presentations for an employee audience. For example, the PA Higher Education Assistance Agency presents information on the Public Sector Loan Forgiveness program, the PA Housing Finance Authority conducts public presentations on home buying, and the Department of Banking and Securities presents on protections from cyber-fraud. The content for retirement webinars is based on eligibility requirements and email announcements target the specific audience, so employees only receive pertinent notices. [Webinars are recorded](#) (where permissible according to regulatory requirements) and distributed to the target audience and made available to all employees on the Financial Wellness website.

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?)

Numerous studies have found a correlation between the financial concerns of employees and their productivity at work and use of leave. Providing employees with accurate financial information from trusted authorities can help to alleviate financial stressors that limit employee engagement and productivity in the workplace.

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

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First, content and announcements are tailored to specific employee groups. Employees are identified by factors such as retirement class, years until retirement eligibility, and enrollment options to receive email notices about webinars relevant to them. Content that is general in nature, such as budgeting or tax preparation, is advertised through normal communication channels and open to all employees.

Next, office tools are utilized to facilitate audience feedback and streamline registration. Attendees are surveyed after every webinar and the findings are shared with the presenters to ensure quality of content and clarity of communication. Registration has evolved into a self-registration process. Registrations, managing audience sizes, and surveys are managed via MS Forms.

Finally, the program continues to leverage virtual presentation technology to reach employees across the Commonwealth. When the pandemic started, the Financial Wellness Program shifted to virtual platforms that enabled attendance to grow more rapidly. Attendance for webinars reached over 7,000 in calendar year 2021 and nearly 12,000 in calendar year 2022. The virtual platform also makes it easier for partners to offer additional content without incurring travel costs.

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.)

Using Commonwealth agencies and existing partners allows for all presentations to be offered for free. HR professionals who specialize in employee benefits have also created webinar content

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at no cost. Existing IT resources are utilized to host and record webinars and website content, communicate the availability of sessions to employee and manage session 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?

[Click or tap here to enter text.](#)

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

The effectiveness of the Financial Wellness Program is measured through growth in the number of webinars and attendance, as well as surveys of attendees to obtain their feedback on the value of the content and suggestions for future sessions. Approximately three-quarters of survey respondents (76% for deferred compensation, 72% for retirement) indicate that sessions met their expectations and comments are positive, indicating the presentations are informative and helpful.

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

The Financial Wellness Program launched with free lunch-n-learn presentations on retirement planning topics and an informational website in 2019. A partnership with the PA Department of

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Treasury was formed and a grant was received from the National Association of State Treasurers in 2020 that allowed for further growth of educational content and communications. After the grant was used, free resources continued to be leveraged to further develop Financial Wellness content. The Financial Wellness Program began with in person meetings and employees showed interest with attendance from 30 to 60 employees per session. Attendance increased to hundreds per session when the program changed to a virtual platform and reached almost 12,000 in calendar year 2022 (not including views of recordings). The variety of content has continued to grow. HR Professionals have added webinars on leave payout, benefit elections for new hires, and [the value of Commonwealth benefits](#). The next new webinar will focus on the action steps and timeframes leading up to an employee's retirement. Lessons learned from the Financial Wellness Program have informed broader changes to employee communications. For example, 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 making complicated benefit elections. Finally, administrative improvements continue to be made on registration and receiving follow up information, such as handouts and contact information. Manually tracking email registrations and a follow up email has evolved into a self-registration process with a calendar invite that includes all pertinent handouts, contact, and additional online resources for attendees.

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