

Profit Sharing

A Survey Report
by the Society for
Human Resource
Management

Continuing
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2009 Employee Benefits

Examining Employee Benefits in a Fiscally Challenging Economy





About This Survey Report

In February 2009, the Society for Human Resource Management (SHRM) conducted its annual survey to gather information on the types of benefits employers offer to their employees. The following report provides an analysis of the 2009 SHRM Employee Benefits Survey results. The survey instrument listed 274 benefits and asked human resource (HR) professionals to indicate whether they offered these benefits. If they offered a benefit, they were asked whether their organization planned to reduce or eliminate the benefit in 2009. If the HR professional reported that his or her organization did not offer the benefit, the respondent was asked if there were plans to offer the benefit in the next year.

Media Contact

Julie Malveaux
julie.malveaux@shrm.org
(703) 535-6273

About SHRM

The Society for Human Resource Management (SHRM) is the world's largest association devoted to human resource management. Representing more than 250,000 members in over 140 countries, the Society serves the needs of HR professionals and advances the interests of the HR profession. Founded in 1948, SHRM has more than 575 affiliated chapters within the United States and subsidiary offices in China and India. Visit SHRM Online at www.shrm.org.

USA

SHRM
1800 Duke Street
Alexandria, VA 22314
Phone: (800) 283-7476
Fax: 703-535-6432
E-mail: shrm@shrm.org

China

Beijing Representative Office
SHRM Corporation
5/F, South Block, Tower C
Raycom Info Tech Park
No.2, Kexueyuan South Road
Zhongguancun, Haidian District
Beijing, 100190
Tel: +86-10-59822093 / 59822146
Fax: +86-10-59822588

India

SHRM India
702, 7th Floor
Raheja Towers
Plot C- 62, G Block
Bandra Kurla Complex, Bandra (E)
Mumbai 400051
Maharashtra
Tel: +91-22-42472000
Fax: +91-22-42472010

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Executive Summary: The Impact of the Economy on Employee Benefits

According to this research, the vast majority of HR professionals indicated that their organizations have been affected by the current financial challenges to the U.S. and global economy. In this fragile economy, organizations are looking for ways to manage costs while at the same time dealing with the escalating expenses of employee benefits. So it is not surprising that 60% of organizations reported that the benefits offerings at their organization have been affected by the current financial challenges.

Additional noteworthy findings included the following:

- ◆ Most employee benefits offerings have experienced a slight downward trend over the last year.
- ◆ HR professionals indicated that their organizations spent on average 20% of an employee's annual salary on mandatory benefits, 19% on voluntary benefits and 11% on pay for time not worked benefits.
- ◆ Eighty-one percent of HR professionals reported that their organizations reviewed their benefits programs annually, and 12% reported reviewing them even more frequently. This percentage increased significantly over the last year. In 2008, almost three-quarters (74%) of HR professionals reported that their organizations reviewed their benefits programs annually.

What Do These Findings Mean for Businesses?

Employees consistently rate benefits as one of the key factors in employee job satisfaction. It is important for an employee benefits package to be attractive to both current and prospective employees as well as cost-effective, especially in this economic downturn.

What are additional ways for organizations to further leverage their benefits programs?

◆ Communicate the Value

Even though benefits are important to employees, a disconnect exists between the dollar amount organizations spend on benefits and the employees' perception of the value of their benefits package. It is essential that HR professionals help employees fully understand all of their options and the true value of their benefits package. Total compensation statements, employee meetings and benefits workshops are examples of communication methods that HR professionals can use to ensure their benefits program is valued and used by employees.

◆ Review and Assess

An organization's benefits program should be reviewed and assessed not only to monitor associated costs and value but also to evaluate the competitiveness of the program. The vast majority of HR professionals in this research study reported that their organizations reviewed their benefits programs at least once a year. Benchmarking tools, survey reports and benefits needs assessments are great tools HR professionals can use to help their organizations customize their benefits programs to meet their needs and to remain competitive.

◆ Monitor Legislation

The 2008 election resulted in victories for the Democratic Party, which captured the White House and increased its majority hold in both the U.S. Senate and the House of Representatives. SHRM predicts the 111th Congress will have the most active workplace policy agenda in the last 30 years. These changes being considered in Congress could have a major impact on HR and employee benefits-related issues: the expansion of the FMLA, new retirement planning and health care reform legislation. HR professionals should constantly monitor changes in legislation to make sure their benefits programs are compliant with local, state and federal laws.¹

In this fragile economy, organizations are looking for **ways to manage costs** while at the same time dealing with the escalating expenses of employee benefits.



A Message From Colonial Life

Colonial Life is a market leader in providing insurance benefits for employees and their families through their workplace, along with individual benefits education, advanced yet simple-to-use enrollment technology and quality personal service. Colonial Life offers disability, life and supplemental accident and health insurance policies in 49 states and the District of Columbia. (Similar policies, if approved, are underwritten in New York by a Colonial Life affiliate, The Paul Revere Life Insurance Company.) Based in Columbia, S.C., Colonial Life helps employers design benefits programs that fit the needs of their business as well as their employees, so they can build a more loyal and satisfied workforce—and ultimately a stronger business.

Colonial Life was founded in 1939, providing insurance protection to everyday working Americans and their families. The company pioneered the concept of worksite marketing in 1955 and helped lead the industry into payroll-deducted premiums. Today, Colonial Life serves more than 60,000 businesses and organizations and has more than 2.8 million policies in force. A home office of 1,100 employees supports a nationwide independent sales organization of 7,300 career agents and approximately 5,300 active contracted brokers.

Our Vision

Colonial Life will be the company of choice for voluntary benefits programs offered through the workplace.

Our Mission

Colonial Life is committed to helping working Americans understand and appreciate the benefits available to them through the workplace and select the benefits they need to protect their families and lifestyles.

We strive to fulfill this mission by providing:

- ◆ Personalized benefits counseling.
- ◆ Advanced yet simple-to-use enrollment technology.
- ◆ A broad portfolio of personal insurance coverage.
- ◆ Individual attention and commitment to service.

We will create valuable and lasting partnerships with employers, their employees, our producers, our business partners and the communities where we work and live.

To learn more, visit coloniallife.com or call (803) 798-7000.

Colonial Life is the marketing brand of Colonial Life & Accident Insurance Company. Colonial Life and the logo, separately and in combination, and “Making benefits count.” are service marks of Colonial Life & Accident Insurance Company.



Survey Results

The Investment in Employee Benefits

Financial Challenges to the U.S. and Global Economy

Respondents were asked to what extent their organizations and benefits offerings had been affected by the financial challenges to the U.S. and global economy. The majority of respondents reported their organizations were feeling the impact of the economic downturn (31% reported being affected to a large extent and 63% to some extent). These data are shown in Figure 1. HR professionals from privately owned for-profit and publicly owned for-profit organizations were more likely to indicate their organizations had been affected.

As shown in Figure 2, 60% of organizations reported that the benefits offerings at their organization have been affected either to a large extent (7%) or to some extent (53%) by the challenges to the U.S. and global economy. When these results were examined by organization sector, those from privately owned for-profit and nonprofit organizations were significantly more likely to report their benefits offerings had been affected by the economy.

Percentage of Payroll Reflecting Total Cost of Benefits

HR professionals indicated that their organizations spent an average of 20% of an employee's annual salary on mandatory benefits (such as unemployment, worker's compensation, Social Security), 19% on voluntary benefits (such as

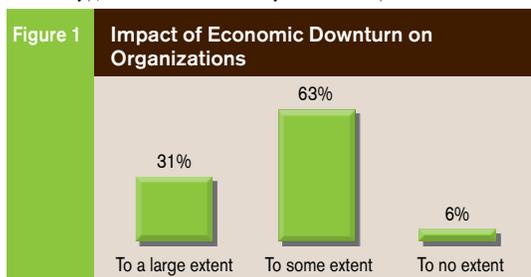
medical plans, dental plans, prescription coverage, flexible spending accounts, vision plans, survivor benefits) and 11% on pay for time not worked benefits (regular rate of pay for a nonworking period of time, such as vacations, holidays, personal, bereavement and sick leave). As shown in Table 1, HR professionals from large and medium organizations indicated that their organizations spent more on voluntary benefits compared with small organizations.

Figures 3, 4 and 5 show that most HR professionals reported these percentages staying about the same in comparison with the previous fiscal year (78% for mandatory benefits, 66% for voluntary benefits and 85% for pay for time not worked benefits). More HR professionals indicated that the percentage of payroll reflecting the cost of voluntary benefits (26%) had increased compared with those who reported increases in mandatory benefits (18%) and pay for time not worked benefits (10%). There were no significant differences by organization size and industry.

Reviewing the Benefits Plan

As seen in Figure 6, 81% of HR professionals reported that their organizations reviewed their benefits programs annually, and 12% reported reviewing them even more frequently. Only 1% of HR professionals indicated that their organizations never reviewed their benefits programs. There were no significant differences by organization size and profit status.

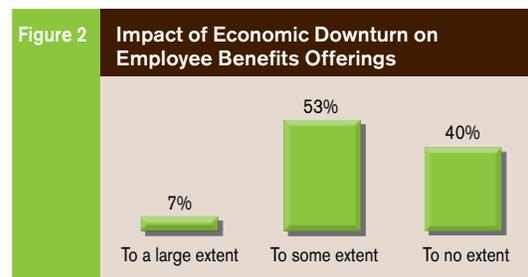
Respondents from privately owned for-profit and nonprofit organizations were **significantly more likely to report** their benefits offerings had been affected by the economy.



(n = 368)

Note: Excludes respondents who answered "not sure."

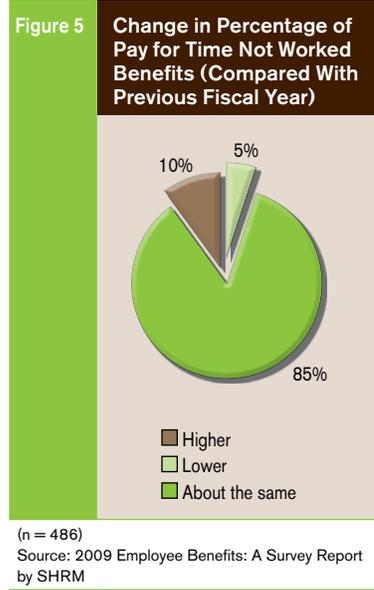
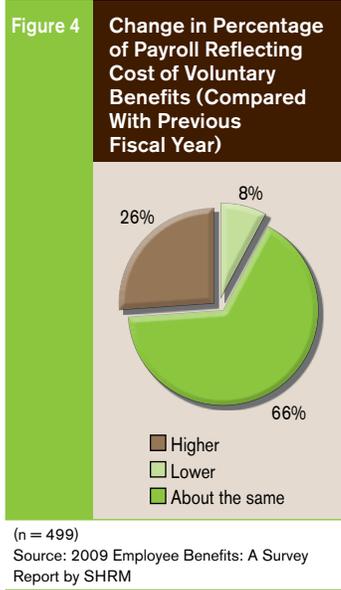
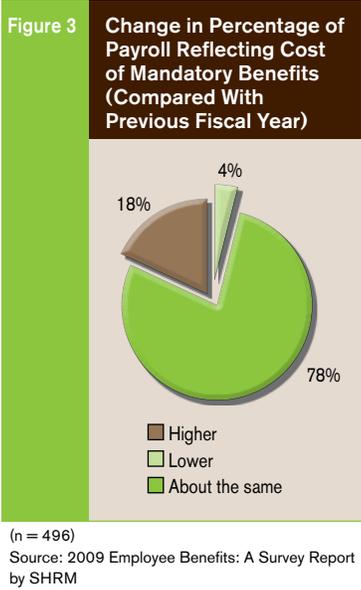
Source: 2009 Employee Benefits: A Survey Report by SHRM



(n = 488)

Note: Excludes respondents who answered "not sure."

Source: 2009 Employee Benefits: A Survey Report by SHRM



HR professionals from large and medium organizations indicated that their organizations **spent more on voluntary benefits** compared with small organizations.

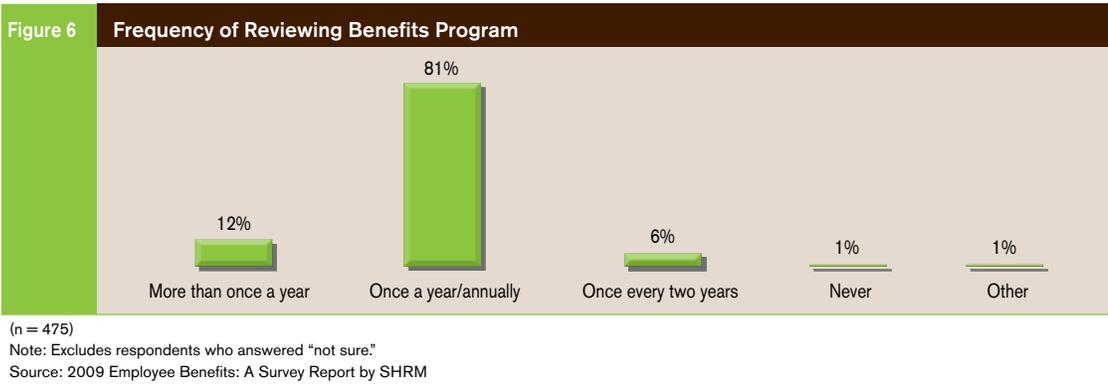


Table 1 Average Percentage of Payroll Reflecting Total Cost of Benefits (by Organization Staff Size)

	Overall	Small (1-99 Employees)	Medium (100-499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Mandatory benefits	20%	20%	21%	20%	
Voluntary benefits	19%	15%	21%	21%	Large, medium > small
Pay for time not worked benefits	11%	11%	10%	11%	

(n = 500)
* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.
Source: 2009 Employee Benefits: A Survey Report by SHRM



Health care and welfare benefits look to remain stable in 2009 overall, but a few organizations do have plans to make some reductions in their health insurance benefits.

Health Care and Welfare Benefits

Table A-1 lists health care and welfare benefits and the percentage of human resource professionals who indicated that their organizations offered each benefit, the percentage of organizations that offer the benefit now but have plans to reduce or eliminate the benefit within the next 12 months and the percentage of those that do not offer the benefit now but have plans to do so within the next 12 months.

To get a complete picture of health care benefits and coverage, respondents indicated whether any aspect of any company-held plan included these particular benefits.²

Ninety-six percent of HR professionals indicated that their organizations offered prescription drug program coverage, and 91% offered a mail-order prescription program. Through a mail-order prescription program, employees can save money on medication by filling prescriptions through licensed pharmacies and having them conveniently delivered through the mail at a discounted rate. Other benefits related to prescription drug coverage included pharmacy management programs (18%) and wholesale generic drug programs for injectable drugs (17%).

Table A-1 Health Care and Welfare Benefits	Percentage of organizations that offer the benefit		
	Percentage of organizations that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
Dental insurance	96%	2%	1%
Prescription drug program coverage	96%	4%	0%
Mail-order prescription program	91%	0%	0%
Preferred provider organization (PPO) plan	81%	6%	*
Chiropractic coverage	80%	3%	*
Mental health coverage	80%	1%	0%
Accidental death and dismemberment insurance (AD&D) ^A	78%	2%	1%
Long-term disability insurance ^B	77%	2%	1%
Vision insurance	76%	3%	1%
Employee assistance program (EAP)	75%	2%	1%
Medical flexible spending accounts ^C	71%	2%	1%
Dependent care flexible spending account	70%	1%	1%
Short-term disability insurance ^D	70%	3%	*
Contraceptive coverage	66%	1%	*
Life insurance for dependents	58%	2%	1%
Health care premium flexible spending account ^E	43%	0%	0%
Supplemental accident insurance	40%	0%	0%
Long-term care insurance	39%	*	0%

continued on page 7



Table A-1 Health Care and Welfare Benefits (continued from page 6)

Health care coverage for dependent grandchildren	37%	3%	*
Domestic partner health care coverage (opposite-sex)	37%	3%	*
Rehabilitation assistance	37%	3%	*
Domestic partner health care coverage (same-sex)	36%	2%	1%
HMO (health maintenance organization) plan	35%	4%	*
Health care coverage for part-time workers	35%	2%	1%
Intensive care insurance	35%	1%	1%
Critical illness insurance	34%	1%	0%
Cancer insurance	33%	2%	1%
Health savings account (HSA)	32%	1%	4%
Surcharges for spousal health care coverage ^F	32%	2%	1%
Health care coverage for foster children	31%	2%	0%
Infertility treatment coverage (other than in-vitro fertilization)	30%	2%	*
Bariatric coverage for weight loss	29%	5%	*
Acupressure/acupuncture medical coverage	28%	1%	*
Health reimbursement account (HRA)	26%	2%	2%
Point of service (POS) plan	26%	4%	0%
Retiree health care coverage	26%	2%	0%
In-vitro fertilization coverage	23%	2%	1%
Hospital indemnity insurance	23%	1%	*
Laser-based vision correction coverage	19%	2%	*
Pharmacy management program	18%	4%	*
Wholesale generic drug program for injectable drugs	17%	2%	1%
Alternative/complementary medical coverage	16%	2%	1%
Employer-matched contributions to health saving account (HSA)	15%	4%	2%
Grief recovery program	15%	1%	*
Consumer-directed health care plan (CDHP)	12%	3%	2%
Support groups	12%	0%	1%
Exclusive provider organization (EPO) plan	8%	10%	*
Indemnity plan (fee-for-service)	7%	0%	0%
Elective procedures coverage (other than laser-based vision correction coverage)	5%	0%	0%
Experimental/elective drug coverage	3%	6%	*
Subsidized cost of elder care	3%	0%	0%
Gender reassignment surgery coverage	1%	0%	0%

(n = 522)

* Less than 1%

A Does not pertain to employee-paid supplemental insurance

B Does not pertain to employee-paid supplemental insurance

C IRC Section 125, for all expenses

D Does not pertain to employee-paid supplemental insurance

E IRC Section 125 Cafeteria Plan allowing for premium conversion

F Health care coverage for a spouse is offered as a benefit to employees, but there is a surcharge added to the employee premium cost

Source: 2009 Employee Benefits: A Survey Report by SHRM



reported that their organizations offered health care coverage for dependent grandchildren. Thirty-seven percent HR professionals indicated that their organizations provided opposite-sex domestic partner health care coverage, and 36% percent offered same-sex domestic partner coverage.

Women's Health

Some organizations offer health care and wellness benefits that focus on childbearing and fertility. The most commonly offered benefit was contraceptive coverage (66%). Thirty percent of HR professionals reported their organizations covered infertility treatment (other than in-vitro fertilization), and 23% specifically offered in-vitro fertilization coverage.

Health Savings Accounts

Health savings accounts (HSAs) were created by the Medicare bill in 2003 and are designed to help individuals save on a tax-free basis for future qualified medical and retiree health costs. More than one-quarter of HR professionals (32%) indicated their organizations provided these accounts. Contributions to HSA accounts can be made by the employer, the employee or both. Fifteen percent of HR professionals indicated their organizations matched contributions made to these accounts.

Flexible Spending Accounts

Medical flexible spending accounts allow employees to deduct pretax dollars from their paychecks to pay for health care services, such as copayments, insurance deductibles and vision and dental expenses. These accounts offer organizations a way to help employees manage their health care costs. The maximum amount each eligible employee may contribute to these accounts is determined by the employer. Seventy-one percent of HR professionals reported that their organizations offered medical flexible spending accounts (Internal Revenue Code (IRC) Section 125, for all expenses), and 43% indicated their organizations offered health care premium flexible spending accounts (IRC Section 125 Cafeteria Plan allowing for premium conversion).

Disability

Long-term disability (offered by 77% of respondents' organizations) and short-term disability (offered by 70% of respondents' organizations) provide income replacement for employees whose illness or injury causes a longer absence from work. Short-term disability usually starts after a one- to two-week absence, and long-term disability usually goes into effect after between six weeks and three months. While paid sick leave usually covers an employee's entire salary, short-term and long-term disability may cover only a portion of the employee's salary.

Mental and Emotional Health

Some organizations offer health and welfare benefits that are directed toward employees' mental and emotional well-being. An employee assistance program (EAP) is a confidential counseling program designed to assist employees with any problems that may distract them from their work. Seventy-five percent of HR professionals indicated that their organizations offered an EAP.

Other benefits in this area included grief recovery programs (15%) and support groups (12%).

Other Health Care and Welfare Benefits

Some employers include nontraditional healing methods among their organizations' health and welfare benefits. Twenty-eight percent of HR professionals indicated that their organizations offered acupuncture/acupuncture medical coverage, 16% reported that their organizations offered other alternative/complementary medical coverage, and 3% said their organizations covered experimental or elective drug treatments.

Thirty-two percent of HR professionals offered surcharges for spousal health care coverage, and 26% offered health care coverage to retirees. Other health care and welfare benefits offered included life insurance for dependents (58%), rehabilitation assistance (37%), bariatric coverage for procedures such as stomach stapling or gastric bypass surgery (29%), laser-based vision correction coverage (19%), elective procedures coverage (other than laser-

37% of HR professionals reported that their organizations offered **health care coverage for dependent grandchildren.**

75% of HR professionals indicated that their organizations offered **an EAP.**



based vision correction coverage) (5%) and gender reassignment surgery coverage (1%).

Health Care and Welfare Benefits by Organization Staff Size and Organization Sector

Overall, larger organizations were significantly more likely to offer most health care and welfare benefits. There were considerable differences by sector in what health care and welfare benefits were offered, though few clear patterns emerged. HR professionals from publicly owned for-profit organizations were more likely to offer a number of these benefits. All results by organization staff size and organization sector are displayed in the appendix.

Health Care and Welfare Benefits Over the Past Five Years

Table A-2 shows the percentages of human resource professionals who indicated that their organizations offered specific health care and welfare benefits from 2005 through 2009. Compared with 2008, there were several decreases in the number of respondents who reported that their organizations offered health and welfare benefits. Contraceptive coverage,

HMO, life insurance for dependents, long-term care insurance, retiree health care coverage, supplemental accident insurance, surcharges for spousal health care coverage and wholesale generic drug program for injectable drugs all decreased from 2008 to 2009. Mental health coverage was the only health care and welfare benefit offered by more organizations in 2009 than in 2008.

Over the past five years, there were several increases and decreases in the number of HR professionals who reported that their organizations offered health care and welfare benefits. The following benefits were offered by fewer organizations in 2009 than in 2005: acupressure/acupuncture medical coverage, alternative/complementary medical coverage, contraceptive coverage, dependent-care flexible spending account, experimental/elective drug coverage, health care coverage for part-time workers, hospital indemnity insurance, indemnity plan, life insurance for dependents, PPO, retiree health care coverage and supplemental accident insurance. The benefits offered by more organizations were cancer insurance, chiropractic insurance, health reimbursement accounts, mental health coverage and rehabilitation assistance.

Mental health coverage was the only health care and welfare benefit offered by more organizations in 2009 than in 2008.

Table A-2 Health Care and Welfare Benefits (by Year)	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
	Prescription drug program coverage	97%	96%	95%	96%		
Dental insurance	95%	93%	94%	94%	96%		
Mail-order prescription program	90%	88%	87%	87%	91%		
Preferred provider organization (PPO) plan	87%	87%	87%	85%	81%	Decrease	
Chiropractic insurance	56%	81%	80%	81%	80%	Increase	
Mental health coverage	72%	73%	73%	75%	80%	Increase	Increase
Accidental death and dismemberment insurance (AD&D)	-	-	-	81%	78%		
Long-term disability insurance	-	-	-	78%	77%		
Vision insurance	80%	73%	79%	78%	76%		
Employee assistance program (EAP)	73%	71%	73%	75%	75%		
Medical flexible spending account	78%	70%	70%	70%	71%		
Dependent-care flexible spending account	79%	76%	76%	75%	70%	Decrease	
Short-term disability insurance	-	-	-	69%	70%		
Contraceptive coverage	82%	75%	74%	73%	66%	Decrease	Decrease
Life insurance for dependents	67%	65%	65%	63%	58%	Decrease	Decrease

continued on page 11



Table A-2 Health Care and Welfare Benefits (by Year) (continued from page 10)

Health care premium flexible spending account	47%	50%	47%	46%	43%		
Supplemental accident insurance	47%	50%	49%	47%	40%	Decrease	Decrease
Long-term care insurance	39%	43%	46%	45%	39%		Decrease
Health care coverage for dependent grandchildren	38%	35%	38%	36%	37%		
Domestic partner health care coverage (opposite-sex)	–	–	–	36%	37%		
Rehabilitation assistance	28%	35%	30%	33%	37%	Increase	
Domestic partner health care coverage (same-sex)	–	–	–	36%	36%		
HMO (health maintenance organization) plan	53%	51%	48%	42%	35%		Decrease
Health care coverage for part-time workers	42%	39%	41%	39%	35%	Decrease	
Intensive care insurance	39%	39%	40%	38%	35%		
Critical illness insurance	38%	39%	38%	37%	34%		
Cancer insurance	28%	36%	35%	28%	33%	Increase	
Health savings account (HSA)	–	23%	29%	29%	32%		
Surcharges for spousal health care coverage	–	36%	33%	37%	32%		Decrease
Health care coverage for foster children	29%	28%	29%	30%	31%		
Infertility treatment coverage (other than in-vitro fertilization)	–	30%	30%	28%	30%		
Bariatric coverage for weight loss	–	8%	16%	21%	29%		
Acupuncture/acupuncture medical coverage	33%	30%	29%	31%	28%	Decrease	
Health reimbursement account (HRA)	18%	18%	29%	27%	26%	Increase	
Point of service (POS) plan	–	–	–	26%	26%		
Retiree health care coverage	31%	29%	35%	32%	26%	Decrease	Decrease
In-vitro fertilization coverage	–	28%	27%	26%	23%		
Hospital indemnity insurance	30%	29%	27%	25%	23%	Decrease	
Laser-based vision correction coverage ^A	–	–	–	–	19%		
Pharmacy management program	–	15%	19%	17%	18%		
Wholesale generic drug program for injectable drugs	–	23%	30%	24%	17%		Decrease
Alternative/complementary medical coverage	21%	20%	19%	18%	16%	Decrease	
Employer-matched contributions to health saving account (HSA)	–	6%	11%	13%	15%		
Grief recovery program	14%	18%	15%	16%	15%		
Consumer-directed health care plan	12%	17%	19%	12%	12%		
Support groups	11%	12%	11%	12%	12%		
EPO (exclusive provider organization) plan	10%	9%	11%	9%	8%		
Indemnity plan	21%	15%	18%	12%	7%	Decrease	
Elective procedures coverage (other than laser-based vision correction coverage) ^A	–	–	–	–	5%		
Experimental/elective drug coverage	10%	4%	6%	5%	3%	Decrease	
Subsidized cost of elder care	–	–	–	4%	3%		
Gender reassignment surgery coverage	–	–	–	–	1%		
Elective procedures ^A	18%	16%	17%	16%	–		

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.
^A Starting in 2009, elective procedures was separated into laser-based vision correction coverage and elective procedures coverage (other than laser-based vision correction coverage).
 Note: A dash (–) indicates that this particular benefit was not asked about or was combined with another benefit.
 Source: 2009 Employee Benefits: A Survey Report by SHRM



A number of organizations **have plans to begin offering preventive health and wellness benefits** within the next 12 months.

Preventive Health and Wellness Benefits

Table B-1 lists preventive health and wellness benefits and the percentage of human resource professionals who indicated that their organizations offered each benefit, the percentage of organizations that offer the benefit now but have plans to reduce or eliminate the benefit within the next 12 months

and the percentage of those that do not offer the benefit now but have plans to do so within the next 12 months. To get a complete picture of these benefits, respondents indicated whether any aspect of any company-held plan included these particular benefits.³

Reducing Costs: A Health Waiver Strategy Central Susquehanna Opportunities Inc., Northumberland County, Pennsylvania

CSO, Inc., a private nonprofit, charitable 501(c)3 organization, based in Shamokin, Penn., is meeting the challenges of the economic downturn and its potential impact on future funding sources by looking at creative ways to bring down benefits costs without compromising its employee benefits package. The company has implemented a new health waiver strategy as a way to retain staff and keep morale high while also reducing health care benefits costs. CSO provides medical benefits for its employees and their dependents without charging a co-premium, and this excellent benefits package has allowed the organization to competitively recruit and retain high-quality staff.

Employees were already given the waiver option but were required to waive all medical benefits to qualify for a waiver payment. The new plan will allow employees to take a full or partial medical waiver option to eliminate unnecessary health benefits and increase take-home pay. The waiver payments are increasing from \$1,500 annually to \$3,500 for waiver of all medical benefits and to \$3,200 for waiver to enroll in only dental and/or vision benefits. The waiver payments will be paid to the employee bi-weekly. The employee may then use the additional money to cover a co-premium on another insurance plan and still have money left over to use where needed. To be eligible to waive medical benefits, employees must have proof that they are covered under another plan. Employees were notified of the new option in December of 2008, and the new plan went into effect on January 1, 2009. Internal surveys showed that 19 employees out of the approximately 92 employees eligible for medical benefits were interested in a full medical waiver, and seven eligible employees stated they would consider a partial waiver. The HR leaders at CSO estimate that offering this waiver option will result in a total annual savings in excess of \$80,000 by 2010 and will enable CSO to continue to pay 100% of the premium for employees and their qualified dependents despite the current economic challenges.



Table B-1 Preventive Health and Wellness Benefits

	Percentage of organizations that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
Wellness resources and information	72%	2%	5%
On-site vaccinations ^A	64%	2%	1%
Wellness programs	59%	2%	5%
CPR/first aid training	53%	1%	2%
24-hour nurse line ^B	50%	2%	1%
Health fairs	44%	4%	3%
Wellness newsletter/column	41%	3%	3%
Smoking cessation program	39%	3%	4%
Health screening programs ^C	38%	4%	3%
Fitness center membership subsidy/reimbursement	35%	3%	2%
Health and lifestyle coaching ^D	33%	2%	8%
Preventive programs specifically targeting employees with chronic health conditions	30%	3%	7%
Weight loss program	30%	3%	5%
Rewards or bonuses for achieving or completing certain health and wellness goals/programs	23%	2%	10%
On-site fitness center	21%	2%	2%
Nutritional counseling	19%	2%	1%
On-site blood pressure machine	18%	2%	2%
On-site fitness classes ^E	12%	2%	3%
Massage therapy services at work	12%	0%	1%
Stress-reduction program	11%	2%	1%
Health care premium discount for getting an annual health risk assessment	10%	0%	3%
Health care premium discount for not using tobacco products	8%	0%	2%
Health care premium discount for participating in a wellness program	8%	0%	2%
On-site sick room	8%	0%	*
On-site medical clinic	5%	0%	0%
Health care premium discount for participating in a weight loss program	4%	0%	3%
Fitness equipment subsidy/reimbursement	4%	3%	*
On-site nap room	4%	0%	*

(n = 522)

* Less than 1%

A For example, flu shots, etc.

B Available to help employees make more informed health care decisions.

C For example, glucose, cholesterol, etc.

D Used to help employees change and better manage their health habits

E For example, yoga, aerobics, etc.

Source: 2009 Employee Benefits: A Survey Report by SHRM



72% of HR professionals indicated that their organizations provided wellness resources and information, and **59% reported their organizations offered wellness programs.**

As the costs of health care continue to spiral upwards, employees and employers are searching for ways to keep these costs under control and as manageable as possible. Preventive health and wellness benefits are designed to help maintain or change employees' behavior in order to achieve better health and decrease the associated health risks. By preventing or lessening the incidence of health conditions, the organizations hope to save on long-term health costs. Seventy-two percent of HR professionals indicated that their organizations provided wellness resources and information, and 59% reported their organizations offered wellness programs.

Preventable and Chronic Conditions

Obesity is a growing health concern in the United States. A recent nationwide analysis of workplace health screenings by Kronos Optimal Health Company reported that 65% of employees are overweight or obese.⁴ There are many health problems associated with excess weight and other types of preventable and chronic conditions. These conditions affect the health and well-being of people and also have a significant economic impact on businesses. According to the U.S. Department of Health and Human Services, obesity alone costs U.S. companies an estimated \$13 billion per year.⁵ HR professionals indicated that their organizations were helping to combat these issues with subsidies or reimbursements for fitness center memberships (35%), health and lifestyle coaching (33%), weight loss programs (30%), on-site fitness centers (21%), nutritional counseling (19%), on-site fitness classes (12%) and fitness equipment subsidy/reimbursement (4%). Other benefits that encouraged a healthy lifestyle included smoking cessation programs (39%) and stress reduction programs (11%).

Other benefits organizations offered to help employees deal with preventable and chronic conditions included on-site vaccinations (64%), health screening programs for conditions such as high glucose or high cholesterol levels (38%) and preventive programs specifically targeting employees with chronic health conditions (30%).

Preventive Health and Wellness Incentives

Almost one-quarter (23%) of HR professionals reported their organizations offered rewards or bonuses for achieving or completing certain health and wellness activities. Some organizations offer health care discounts to employees for participating in health-related assessments or programs. Ten percent of respondents indicated that their organizations provided health care premium discounts for getting an annual health risk assessment, 8% offered discounts for participating in a wellness program, 8% provided a discount for not using tobacco products, and 4% provided health care premium discount for participating in a weight loss program.

Preventive Health and Wellness Resources

Preventive health and wellness resources help make employees aware of wellness issues while providing them with important tools to live a healthy lifestyle.

Forty-four percent of HR professionals indicated their organizations offered health fairs, and 41% reported their organizations had a wellness newsletter/column.

Almost one-quarter (23%) of HR professionals reported their organizations **offered rewards or bonuses for achieving or completing certain health and wellness activities.**



Other Preventive Health and Wellness Benefits

HR professionals reported their organizations had CPR/first aid training (53%), 24-hour nurse line (50%) and an on-site blood pressure machine (18%). Additionally, 12% of respondents indicated that their organizations offered massage therapy services for employees at the office. Massage therapy can be a great health maintenance tool that aids in stress reduction. This may be especially beneficial for employees who work in a very stressful work environment. Less commonly offered benefits included on-site sick rooms (8%), medical clinics (5%) and nap rooms (4%).

Preventive Health and Wellness Benefits by Organization Staff Size and Organization Sector

Again, larger organizations were more likely than smaller organizations to offer many preventive health and wellness benefits. There was some variation by sector in the likelihood of providing these benefits. HR professionals from privately owned for-profit organizations were less likely to offer a number of preventive health and wellness benefits. All results by organization staff size and organization sector are displayed in the appendix.

Preventive Health and Wellness Benefits Over the Past Five Years

Table B-2 shows the percentages of human resource professionals who indicated that their organizations offered specific preventive health and wellness benefits from 2005 through 2009. There were no significant changes in these benefits from 2008 to 2009.

The following two benefits were offered by more organizations in 2009 than in 2005: on-site vaccinations (64% in 2009 compared with 56% in 2005) and weight loss program (30% in 2009 compared with 25% in 2005). The benefits offered by fewer organizations were health screening programs (38% in 2009 compared with 44% in 2005) and stress-reduction program (11% in 2009 compared with 18% in 2005).

HR professionals from privately owned for-profit organizations were **less likely to offer** a number of preventive health and wellness benefits.

A Wellness Initiative: Help Employees Focus on Their Health Ellis County, Texas

With its premiums doubling in January 2008, Ellis County decided to launch a wellness initiative designed to reduce health care costs. Its HR team kicked off the wellness program in September 2008 with an employee health fair, which was attended by more than 300 of its 550 employees. A total of 160 received flu shots, and many had blood pressure, glucose and cholesterol testing. They were introduced to exercise strategies, gave blood, ate a healthy lunch and were given information and resources on healthy lifestyles. The organization's HR leaders also fielded a survey to find out which health and safety topics employees were most interested in, and based on the results of the survey, the company started monthly classes to discuss these topics. Ellis County also formed a partnership with the Texas AgriLife Extension Service to provide educational handouts with every pay check. The wellness program appears to be succeeding; premiums went down in the last part of 2008 and continued to decline in 2009.



Table B-2 Preventive Health and Wellness Benefits (by Year)

	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
Wellness resources and information	–	–	–	72%	72%		
On-site vaccinations	56%	65%	62%	67%	64%	Increase	
Wellness programs	–	–	–	58%	59%		
CPR training/first aid	56%	57%	55%	55%	53%		
24-hour nurse line	–	–	–	50%	50%		
Health fairs	–	–	–	44%	44%		
Wellness newsletter or column	–	–	–	40%	41%		
Smoking cessation program	34%	39%	40%	40%	39%		
Health screening programs	44%	49%	47%	41%	38%	Decrease	
Fitness center membership subsidy/reimbursement	31%	37%	30%	36%	35%		
Health and lifestyle coaching	–	–	–	33%	33%		
Preventive programs specifically targeting employees with chronic health conditions	–	–	31%	30%	30%		
Weight loss program	25%	29%	32%	31%	30%	Increase	
Rewards or bonuses for achieving or completing certain health and wellness goals/programs	–	–	–	23%	23%		
On-site fitness center	24%	22%	25%	21%	21%		
Nutritional counseling	–	–	–	20%	19%		
On-site blood pressure machine	–	–	–	17%	18%		
On-site fitness classes	–	–	15%	15%	12%		
Massage therapy services at work	12%	14%	13%	14%	12%		
Stress-reduction program	18%	19%	15%	14%	11%	Decrease	
Health care premium discount for getting an annual health risk assessment	–	–	12%	11%	10%		
Health care premium discount for participating in a wellness program	–	–	10%	9%	8%		
Health care premium discount for not using tobacco products	–	–	10%	8%	8%		
On-site sick room	–	–	–	–	8%		
On-site medical clinic	–	–	–	–	5%		
Health care premium discount for participating in a weight loss program	–	–	–	–	4%		
Fitness equipment subsidy/reimbursement	–	–	–	6%	4%		
On-site nap room	–	–	–	5%	4%		

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.
 Note: A dash (–) indicates that this particular benefit was not asked about or was combined with another benefit.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Financial and Compensation Benefits

Table C-1 lists the prevalence of 59 financial and compensation benefits.

Table C-1	Financial and Compensation Benefits	Percentage of organizations		
		that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
	Payroll deductions	93%	2%	0%
	Life insurance ^A	91%	2%	1%
	Defined contribution retirement savings plan ^B	90%	3%	*
	On-site parking	90%	2%	0%
	Employer match for defined contribution retirement savings plan	72%	7%	*
	Defined contribution plan loans ^C	69%	0%	*
	Undergraduate educational assistance	63%	7%	0%
	Business cell phone or handheld device for personal use	62%	4%	0%
	Balanced funds ^D	61%	2%	*
	Graduate educational assistance	59%	7%	0%
	Employee referral bonus	52%	5%	0%
	Automobile allowances for business use of personal vehicles	51%	4%	*
	Incentive bonus plan (executive)	50%	8%	1%
	Incentive bonus plan (nonexecutive)	45%	9%	1%
	Target-date retirement funds ^E	39%	2%	*
	Spot bonus ^F	38%	7%	1%
	Individual investment advice	38%	2%	*
	Employee discounts on company services	38%	1%	0%
	Shift premiums	38%	3%	0%
	Credit union	36%	2%	0%
	Automatic enrollment into defined contribution retirement plan ^G	35%	2%	1%
	Retirement planning services	35%	1%	1%
	Donations for participation in charitable events	32%	6%	1%
	Defined benefit pension plan ^H	29%	2%	0%
	Employee computer purchase discounts (not a loan)	29%	8%	0%
	Financial planning services	28%	3%	1%
	Full flexible benefits plan ^I	28%	2%	1%
	Company-owned car for employee use	27%	8%	0%
	Sign-on bonus (executive)	27%	8%	0%
	Roth 401(k) savings plan	24%	5%	1%
	Accelerated death benefits ^J	23%	1%	0%
	Sign-on bonus (nonexecutive)	21%	9%	0%
	Matching charitable contributions	19%	8%	1%

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Table C-1 Financial and Compensation Benefits (continued from page 17)

Loans to employees for emergency/disaster assistance	19%	2%	*
Payroll advances	18%	7%	0%
Scholarships for members of employees' families	17%	3%	1%
Stock options	16%	5%	*
Accident insurance ^K	16%	2%	0%
Stock purchase plan	15%	8%	0%
Auto insurance program	14%	1%	*
Qualified transportation spending account	13%	1%	1%
Transit subsidy	13%	2%	1%
Financial literacy programs	12%	3%	1%
Retention bonus (executive)	11%	8%	0%
Credit counseling service	10%	4%	1%
Low-/no-interest loans to employees for non-emergency situations	10%	8%	0%
Parking subsidy	10%	6%	0%
Retention bonus (nonexecutive)	10%	14%	0%
SERP (supplemental executive retirement plan)	8%	5%	*
On-site check cashing	8%	0%	0%
Carpooling subsidy	6%	0%	*
Cash balance pension plan	6%	0%	0%
Formal phased retirement program ^L	6%	0%	1%
Free or discounted home Internet service	6%	0%	0%
Free computers to employees for personal use	5%	8%	*
Loans for employees to purchase personal computers	5%	8%	*
Personal tax services	3%	0%	*
Educational loans for members of employees' families	2%	25%	0%
401(k) debit card ^M	1%	0%	*

(n = 522)

* Less than 1%

A Does not pertain to employee-paid supplemental insurance

B 401 (k), 403 (b) or similar type plan

C Allows participants to borrow from their retirement savings

D A fixed blend of bonds and stocks

E Includes all funds that shift investments over time depending on the employee's target retirement date

F Unscheduled bonus for good performance

G New employees enrolled unless they opt out

H Provides retirees with guaranteed payment based on years of service and pay

I Ability to select from a variety of benefits

J For terminal illnesses

K Separate from travel accident insurance

L Reduced schedule and/or responsibilities prior to full retirement

M Allows users to borrow up to \$50,000 or 50% of the value of your retirement savings, whichever is less, through use of a debit card

Source: 2009 Employee Benefits: A Survey Report by SHRM



Did you know? The top three benefits employees would like to see their organizations add as a result of increasing gas prices are: offer employees cost-of-living increases as a direct result of gas prices (39%), reward employees with gas cards (34%) and offer flexible work benefits such as telecommuting, flex time and compressed workweeks that reduce the need to commute (25%).

Source: SHRM Employee Omnibus Survey, January 2009

Monetary Convenience Benefits

Many financial and compensation benefits aim to make monetary transactions more convenient for employees. The most frequently offered benefit was payroll deductions (93%). Thirty-six percent of respondents indicated that their organizations offered a membership in a credit union. Credit unions often offer lower interest rates and fees than traditional banks or financial institutions. Nineteen percent of HR professionals reported that their organizations offered loans to employees for emergency or disaster assistance, while 10% offered low- or no-interest loans for non-emergency situations. Finally, 18% of respondents said their organizations offered payroll advances, and 8% provided check-cashing services on-site.

Insurance

Ninety-one percent of HR professionals indicated that their organizations offered life insurance to

employees, 23% offered accelerated death benefits for financial assistance in the case of a terminal illness, and 16% offered accident insurance (separate from travel accident insurance).

Commuter Benefits

Some organizations offer benefits to offset the costs employees incur in commuting to and from the office. The U.S. Census Bureau estimates that 88% of U.S. workers drive to work.⁶ Ninety percent of HR professionals indicated that their organizations offered on-site parking, and 10% offered parking subsidies. Fifty-one percent of HR professionals reported that their organizations offered automobile allowance/expenses. Thirteen percent of HR professionals said their organizations offered qualified transportation spending accounts, a specific type of flexible spending account that deducts a portion of an employee's pretax earnings to an account that reimburses the employee for transportation expenses such as tolls, transit passes and parking fees. The Census Bureau also reports that 12% of employees carpool to work and 5% take public transportation.⁷ According to the survey results, some organizations offered benefits to encourage these employees by providing transit subsidies (13%) or carpooling subsidies (6%). These benefits help reduce the number of vehicles on the road and the environmental impact of commuting; they may also help lower stress levels of employees who would otherwise spend a large amount of time in traffic during their daily commutes. The financial effects of rising gas prices may make transit and carpooling subsidies more valued benefits in the future.⁸

Finally, 27% of HR professionals offered company-owned vehicles for employee use, and 14% offered an auto insurance program to employees.

Retirement and Financial Planning

Many organizations offer retirement plans to help employees plan for their financial future. Respondents indicated that their organizations offered a number of different types of retirement plans: defined contribution retirement plans (90%)

A number of organizations have plans to **reduce or eliminate many financial and compensation benefits** within the next 12 months.



were the most commonly offered, followed by traditional defined benefit pension plans (29%), Roth 401(k) savings plans (24%) and cash balance pension plans (6%). Ninety-two percent of HR professionals said their organizations offered at least one retirement plan. Additionally, 8% offered supplemental executive retirement plans (SERPs). These are non-qualified plans that grant benefits above those covered in other retirement plans that are authorized under the Employee Retirement Income Security Act (ERISA); however, these plans are not required to be funded and can be lost if the organization goes bankrupt.

In defined contribution plans, the employer states that it will contribute a fixed amount, or no amount, to the employee's individual account. The employee bears the investment risk in these plans since the value of the account's investments may decrease over time. The employee may also contribute to his or her account. Seventy-two percent of HR professionals said their organizations provided an employer match on some or all of the employee's contributions, increasing the overall value to the employee. Sixty-nine percent of HR professionals reported their organizations offered defined contribution plan loans. These loans allow participants to borrow from their retirement savings. Additionally, 35% of respondents indicated that their organizations automatically enrolled employees into their defined contribution plans unless employees actively opted out, and 1% reported their organizations offered 401(k) debit cards.

Defined benefit plans, as their name suggests, differ from defined contribution plans in that the employer promises to pay a certain benefit upon the employee's retirement. The benefit amount is calculated based on factors such as age, earnings and length of service. Employers bear the investment risk in these plans since they are required to pay the promised benefit regardless of the plan's investment performance. The Roth 401(k) is a retirement savings plan that combines some aspects of both the 401(k) and the Roth IRA. Under the Roth 401(k), employees can decide to contribute funds on a post-tax elective deferral basis. For 2009, an employee can

contribute \$16,500 (plus an additional \$5,500 if an employee is 50 or older). Cash balance pension plans (offered by 6% of organizations) are technically a type of defined benefit plan, though they look like a defined contribution plan in that employees have and can see their individual account balances.

Six percent of respondents reported offering a phased retirement program (a reduced schedule and/or responsibilities prior to full retirement), which offers older workers a way to ease into retirement while passing along institutional knowledge to others.

Finally, supplemental executive retirement plans (SERPs), reported by 8% of respondents, offer additional retirement income to higher-level employees.

Organizations also offered financial planning benefits such as individual investment advice (38%), retirement planning services (35%), financial planning services (28%) and financial literacy programs (12%).

While these programs do not directly contribute to employees' retirement savings, they can help employees plan for a financially sound retirement as well as other major life goals, such as buying a home or sending a child to college. Finally, 3% of HR professionals indicated that their organizations offered personal tax services for employees.

Educational Assistance

Some organizations provide educational assistance to the dependents of their employees. Almost two-thirds of HR professionals (63%) indicated that their organizations offered undergraduate educational assistance, and 59% offered graduate educational assistance. As with career development benefits, educational assistance not only helps the employee but also benefits the employer by developing a more educated workforce.

Seventeen percent reported that educational assistance was provided to members of employees' families in the form of scholarships. In addition, 2% indicated their organizations offered educational loans for members of employees' families.

Overall, 58% of HR professionals indicated that their organizations offered some form of incentive bonus plans—50% offered the plan to executive employees and 45% offered it to nonexecutive employees.



Monetary Bonuses

Many organizations supplement employees' base pay with some type of monetary bonuses. The most commonly offered type of bonus was an incentive bonus plan, wherein the organization lays out criteria that, if met, result in additional compensation for employees. Overall, 58% of HR professionals indicated that their organizations offered some form of incentive bonus plans—50% offered the plan to executive employees and 45% offered it to nonexecutive employees. Incentive bonus plans can promote high performance because the bonus amount is usually tied directly to company and/or individual performance.

Fifty-two percent of HR professionals indicated that their organizations offered employee referral bonus to encourage current employees to refer others to the organization. Referral bonuses can both expand the applicant pool and potentially reduce recruiting costs, and they tend to be one of the most effective recruiting strategies available to organizations.

Twenty-seven percent of HR professionals reported that their organizations offered sign-on bonuses to executive-level employees, and 21% offered these bonuses to nonexecutive employees. Sign-on bonuses are bonuses provided to employees when they agree to join the company. A sign-on bonus usually must be returned if the employee leaves the organization within a certain time frame, and therefore it helps both recruitment and retention.

Additionally, 11% of respondents reported that their organizations offered specific retention bonuses to executive-level employees and 10% offered them to nonexecutive employees. These bonuses usually reward an employee for agreeing to stay with the organization through a particular project or period of time. Finally, 38% of HR professionals indicated that their organizations offered spot bonuses, or unscheduled bonuses for exceptional performance.

Supplemental Compensation

In addition to bonuses, organizations offered a number of other types of supplemental compensation. Thirty-eight percent of respondents

reported that their organizations offered shift premiums to workers who worked outside traditional nine-to-five office hours.

Some organizations also offer additional compensation in the form of company stock. Sixteen percent of respondents reported that their organizations offered stock options, and 15% offered stock purchase plans, allowing employees to purchase shares of company stock, often at a discount and/or through a direct deduction from their paychecks.

Technology Discounts

Many organizations offer free or discounted technological services or devices for employee use. For example, 62% offered business cell phone or handheld device to employees for personal use. These devices are helping to further blur the line between work life and nonwork life since they allow employees to be available for both business and personal contact at any time.

As personal computer and Internet use becomes more ubiquitous, organizations are offering benefits that help employees manage the associated costs. According to the survey respondents, these benefits included employee computer purchase assistance or discounts (29%), free or discounted Internet service (6%), free computers for personal use (5%) and loans for employees to purchase personal computers (5%).

Other Financial Benefits

Fifty-nine percent of HR professionals indicated their organizations offered balanced funds (61%), which is a fixed blend of bonds and stocks. The funds provide both income and capital appreciation while preventing excessive risk. Thirty-nine percent reported their organizations provided target-date retirement funds. These funds shift investments over time depending on the employee's target retirement date.

Other financial benefits organizations provided were employee discounts on company services (38%), donation for participating in charitable events (32%), full flexible benefits plans (28%), matching charitable contributions (19%) and credit counseling services (11%).



Financial and Compensation Benefits by Organization Staff Size and Organization Sector

Large and medium-sized organizations were most likely to offer many financial and compensation benefits. Overall, publicly owned for-profit organizations were significantly more likely to offer these benefits.³

Financial and Compensation Benefits Over the Past Five Years

Table C-2 shows the percentages of human resource professionals who indicated that their organizations offered these financial and compensation benefits from 2005 through 2009. The only benefit that significantly increased from 2008 was the percentage of respondents who indicated that their organizations offered defined contribution retirement plan (90% in 2009 compared with 84% in 2008). The only financial and compensation benefit offered by fewer organizations in 2009 compared with 2008 was the executive retention bonus, the

prevalence of which dropped from 17% in 2008 to 11% in 2009.

Over the last five years, there were several decreases in the number of HR professionals who reported that their organizations offered financial and compensation benefits. The following benefits were offered by fewer organizations in 2009 than in 2005: accelerated death benefits, accident insurance, credit union, graduate educational assistance, incentive bonus plan (executive), incentive bonus plan (nonexecutive), matching charitable contributions, scholarships for members of employees' families, shift premium, stock options and traditional defined benefit pension plan. Compared with 2005, the following benefits were offered by more organizations in 2009: automatic enrollment into defined contribution retirement plan, business cell phone or handheld device for personal use, defined contribution retirement plan, employee referral bonus and individual investment advice.

The only financial and compensation benefit offered by fewer organizations in 2009 compared with 2008 was **the executive retention bonus**, the prevalence of which dropped from 17% in 2008 to 11% in 2009.

Maintaining Benefits While Avoiding Layoffs A Drilling Company in Houston

A U.S.-based drilling company is making an effort to help its rig workers as it is dealing with the implications of a down economy and the decline in the price of oil. The HR leaders in the organization recognized that one of the most important factors for employees was access to key benefits, especially medical insurance. With fewer rigs in full operation, the decision was made to avoid layoffs by creating a rotational schedule where workers work one week on and then have three weeks off. Though employees only receive pay for the week worked, they are able to keep their original benefits in place. The HR department worked with its vendors to adjust contracts to ensure that employees continue to get their benefits such as medical and life insurance. The company is even continuing 401(k) matches, though at the rate of the current pay, which is lower because of the reduced hours. While the company recognizes it may lose people, the leadership believes that this plan helps to remove a major source of anxiety for employees who are very concerned about the loss of key benefits for themselves and their families.

HR leaders in the company have implemented an ongoing communication plan that explains different options that employees can take given the current crisis. Though normally HR focuses on encouraging employees to save as much as possible, given the tough times, they are trying to communicate realistic ways employees can cut back temporarily, such as through reducing 401(k) contributions. Finding the right balance between trying to get employees through the current downturn and also preparing them for the long term is something that is constantly being reevaluated.



Table C-2 Financial and Compensation Benefits (by Year)

	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
Payroll deductions	97%	95%	95%	94%	93%		
Life insurance	94%	92%	92%	92%	91%		
Defined contribution retirement plan	81%	81%	83%	84%	90%	Increase	Increase
On-site parking	88%	94%	91%	90%	90%		
Employer match for defined contribution retirement plan	75%	74%	74%	75%	72%		
Defined contribution plan loans	–	–	–	69%	69%		
Undergraduate educational assistance	67%	66%	68%	66%	63%		
Business cell phone or handheld device for personal use	51%	48%	53%	65%	62%	Increase	
Balanced funds	–	–	–	59%	61%		
Graduate educational assistance	64%	64%	65%	61%	59%	Decrease	
Employee referral bonus	44%	48%	51%	54%	52%	Increase	
Automobile allowances for business use of personal vehicles	51%	60%	49%	52%	51%		
Incentive bonus plan (executive)	61%	62%	60%	54%	50%	Decrease	
Incentive bonus plan (nonexecutive)	50%	49%	47%	47%	45%	Decrease	
Target-date retirement funds	–	–	–	37%	39%		
Spot bonus	37%	41%	40%	38%	38%		
Individual investment advice	33%	48%	42%	40%	38%	Increase	
Employee discount on company services	40%	45%	36%	39%	38%		
Shift premium	43%	47%	46%	40%	38%	Decrease	
Credit union	55%	46%	46%	43%	36%	Decrease	
Automatic enrollment into defined contribution retirement plan	30%	30%	32%	32%	35%	Increase	
Retirement planning services	38%	52%	37%	38%	35%		
Donations for participation in charitable events	–	–	–	–	32%		
Traditional defined benefit pension plan ^	39%	48%	40%	33%	29%	Decrease	
Employee computer purchase discounts (not a loan)	31%	37%	35%	33%	29%		
Financial planning services	–	–	–	–	28%		
Full flexible benefits plan	–	–	37%	24%	28%		
Company owned car for employee use	28%	31%	28%	25%	27%		
Sign-on bonus (executive)	30%	34%	30%	31%	27%		
Roth 401(k) savings plan	–	–	16%	21%	24%		
Accelerated death benefits	32%	34%	30%	22%	23%	Decrease	
Sign-on bonus (nonexecutive)	21%	24%	24%	24%	21%		

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Table C-2 Financial and Compensation Benefits (by Year) (continued from page 23)

Matching charitable contributions	34%	31%	27%	25%	19%	Decrease
Loans to employees for emergency/disaster assistance	–	–	24%	19%	19%	
Payroll advances	–	–	–	–	18%	
Scholarships for members of employees' families	27%	19%	20%	20%	17%	Decrease
Stock options	29%	26%	24%	19%	16%	Decrease
Accident insurance	33%	37%	23%	18%	16%	Decrease
Stock purchase plan	19%	20%	16%	19%	15%	
Auto insurance program	12%	14%	13%	15%	14%	
Qualified transportation spending account	14%	18%	11%	15%	13%	
Transit subsidy	14%	13%	16%	13%	13%	
Financial literacy programs	–	–	–	–	12%	
Retention bonus (executive)	12%	16%	17%	17%	11%	Decrease
Credit counseling service	–	–	–	13%	10%	
Low-/no-interest loans to employees for non-emergency situations	–	–	7%	9%	10%	
Parking subsidy	11%	10%	12%	11%	10%	
Retention bonus (nonexecutive)	10%	10%	13%	14%	10%	
Supplemental executive retirement plan (SERP)	13%	18%	15%	11%	8%	
On-site check cashing	12%	10%	11%	11%	8%	
Carpooling subsidy	5%	7%	8%	5%	6%	
Cash balance pension plan	11%	10%	7%	9%	6%	
Formal phased retirement program	10%	13%	12%	6%	6%	
Free or discounted home Internet service	11%	11%	11%	9%	6%	
Free computer to employees for personal use	4%	7%	5%	6%	5%	
Loans for employees to purchase personal computer	7%	7%	8%	6%	5%	
Personal tax services	2%	3%	5%	3%	3%	
Educational loans for members of employees' families	7%	6%	5%	3%	2%	
401(k) debit card	–	–	–	–	1%	

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.

A Starting in 2007, defined benefit retirement plan was changed to traditional defined benefit pension plan (provides retirees with guaranteed payment based on years of service and pay).

Note: A dash (–) indicates that this particular benefit was not asked about or was combined with another benefit.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Paid Leave Benefits

Paid leave benefits include paid and unpaid time away from work for a wide assortment of activities, from vacation and personal days to sabbatical programs and military leave. Table D-1 lists various leave benefits and the percentages of human resource professionals who indicated that their organizations offered each one.

The most commonly offered leave benefits were paid holidays (97%), paid bereavement leave (90%) and paid jury duty above what is required by law (62%).

Paid Vacation Leave

Eighty-nine percent of respondents reported that their organization provided some form of paid vacation leave to their full-time employees: 42% of respondents reported that their organizations offered paid vacation leave through a paid time off plan and 47% offered a stand-alone paid vacation plan.⁹ Twenty percent of HR professionals indicated that their organizations offered a time bank of vacation leave, wherein employees donate vacation to a general pool that can then be used by other workers. Eight percent reported offering a vacation purchase plan, which allows employees to “buy” additional vacation days through a payroll deduction.

Did you know? In organizations that offered paid holidays, employees will receive, on average, nine paid holidays in 2009.

Source: Examining Paid Leave in the Workplace (SHRM 2009)

Paid Personal Leave and Floating Holidays

Paid personal leave provides employees with paid leave to use as they see fit. Personal days may be used by employees for accessories such as birthdays, religious purposes and mental health days. By

offering this benefit, organizations recognize the need for employees to take time off for purposes other than illness or vacation. Thirty-one percent of organizations offered paid personal leave separate from paid vacation and paid sick leave plans (paid time off plans include personal days).

Floating holidays give employees more flexibility by allowing them to take off a certain number of days to be used throughout the year for holidays of their choice. Forty-five percent of HR professionals reported that their organization offered paid floating holidays.

Did you know? Organizations offer an average of three days of paid personal leave each year.

Source: Examining Paid Leave in the Workplace (SHRM 2009)

Paid Sick Leave

Organizations offer a variety of leave benefits to employees who must miss work due to illness. These benefits protect employees against the loss of income during short-term absences from the workplace. Overall, 81% of companies provided some form of paid sick leave to employees: 42% of respondents reported that their organizations offered paid sick leave through a paid time off plan and 39% offered a stand-alone sick leave plan. Sixteen percent of respondents indicated that their organizations offered a time bank of sick leave, which allowed employees to donate sick leave to a general pool where the donated leave could be used by workers who had exhausted their own sick leave.

Family and Medical Leave Act (FMLA)

The federal Family and Medical Leave Act (FMLA) of 1993 guarantees eligible employees 12 weeks of unpaid job-protected leave during any 12-month



Table D-1

Paid Leave Benefits

	Percentage of organizations that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
Paid holidays	97%	3%	0%
Paid bereavement leave	90%	2%	0%
Paid jury duty above what is required by law	62%	2%	0%
Paid vacation plan	47%	1%	0%
Floating holidays ^A	45%	3%	0%
Paid time off plan ^B	42%	0%	0%
Paid sick leave plan	39%	1%	0%
Paid personal day(s)	31%	1%	*
Paid family leave	25%	5%	*
Paid military leave ^C	24%	3%	*
Family leave above required federal FMLA leave	22%	3%	*
Time bank of vacation leave ^D	20%	2%	2%
Family leave above required state FMLA leave	20%	3%	*
Parental leave above federal FMLA leave	17%	2%	*
Time bank of sick leave ^E	16%	4%	1%
Paid time off for volunteering	15%	1%	1%
Paid adoption leave	15%	4%	*
Parental leave above state FMLA leave	15%	3%	*
Paid paternity leave	15%	4%	0%
Paid maternity leave ^F	14%	7%	0%
Unpaid sabbatical program	12%	2%	0%
Elder care leave above federal FMLA leave	11%	3%	*
Elder care leave above state FMLA leave	11%	4%	*
Paid day off for employee's birthday	8%	2%	0%
Vacation purchase plan ^G	8%	7%	0%
Emergency flexibility ^H	6%	9%	0%
Paid sabbatical program	5%	7%	0%
Company-paid group vacations	1%	29%	*

(n = 522)

* Less than 1%

A Other than personal days

B Sick, vacation and personal days all in one plan

C Beyond what may be required by law

D Donating vacation leave to other employees

E Donating sick leave to other employees

F Other than what is covered by short-term disability

G Payroll deduction

H Fixed number of days off with pay for emergencies

Source: 2009 Employee Benefits: A Survey Report by SHRM



15% of respondents indicated that their organizations offered paid adoption leave, 15% offered paid paternity leave, and 14% offered paid maternity leave.

Paid time off benefits look to remain relatively stable in 2009.

Very few organizations that offered these benefits plan on reducing or eliminating them.

period for an employee's serious medical condition or to care for a spouse, parent or child.¹⁰ During this leave, the employee retains his or her benefits. Some states have further FMLA requirements as well. Federal law does not require FMLA leave to be paid, but 25% of HR professionals reported their organizations did offer paid family leave. Twenty-two percent of HR professionals reported that their organizations offered family leave above required federal FMLA, and 20% offered family leave above required state FMLA. Additionally, 17% reported offering parental leave above federal FMLA, 15% reported offering parental leave above state FMLA, and 11% reported offering elder care leave above federal and state FMLA. Information about the FMLA can be found at www.dol.gov/esa/whd/fmla/.

Military Leave

As the conflicts in Iraq and Afghanistan continue and the United States relies on the service of the National Guard and Reserve personnel abroad, some organizations are forced to deal with employees who are away from the office on active duty. Twenty-four percent of HR professionals reported that their organizations offered paid military leave beyond what may be required by law (a small number of states have paid military leave requirements).

Leave for New Parents

There are also some paid leave benefits available to new parents. Fifteen percent of respondents indicated that their organizations offered paid adoption leave, 15% offered paid paternity leave and 14% offered paid maternity leave (other than what is covered by short-term disability).

Other Leave Benefits

Other types of leave offered by respondents' organizations included paid time off for volunteering (15%), unpaid sabbatical programs (12%), a paid day off for the employee's birthday (8%), emergency flexibility (fixed number of days off with pay for emergencies) (6%), paid sabbatical programs (5%) and company-paid group vacations (1%).

Paid Leave Benefits by Organization Staff Size and Organization Sector

Overall, larger organizations were significantly more likely to offer paid leave benefits. There were no significant differences in these benefits by profit status. All results by organization staff size and organization sector are displayed in the appendix.

Paid Leave Benefits Over the Past Five Years

Table D-2 shows the percentages of HR professionals who indicated that their organizations offered these paid leave benefits from 2005 through 2009. There were no significant changes in these benefits from 2008 to 2009.

The following two benefits were offered by fewer organizations in 2009 than in 2005: paid family leave (25% in 2009 compared with 30% in 2005) and family leave above required state FMLA leave (20% in 2009 compared with 25% in 2005).



Table D-2 Paid Leave Benefits (by Year)

	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
Paid holidays	99%	98%	97%	97%	97%		
Paid bereavement leave	92%	91%	90%	90%	90%		
Paid jury duty above what is required by law ^A	–	–	–	–	62%		
Paid vacation plan ^B	–	–	–	–	47%		
Floating holidays	–	–	–	–	45%		
Paid time off plan ^B	–	–	–	–	42%		
Paid sick leave plan ^B	–	–	–	–	39%		
Paid personal days ^B	–	–	–	–	31%		
Paid family leave	30%	32%	33%	25%	25%	Decrease	
Paid military leave	28%	31%	29%	29%	24%		
Family leave above required federal FMLA leave	26%	27%	27%	25%	22%		
Time bank of vacation leave	16%	18%	22%	21%	20%		
Family leave above required state FMLA leave	25%	25%	24%	22%	20%	Decrease	
Parental leave above federal FMLA	18%	20%	21%	21%	17%		
Time bank of sick leave	13%	14%	16%	13%	16%		
Paid time off for volunteering	–	–	–	18%	15%		
Paid adoption leave	18%	16%	20%	15%	15%		
Parental leave above state FMLA	18%	19%	20%	19%	15%		
Paid paternity leave	16%	13%	17%	13%	15%		
Paid maternity leave	17%	12%	18%	15%	14%		
Unpaid sabbatical program	17%	22%	16%	13%	12%		
Elder care leave above federal FMLA	11%	14%	16%	13%	11%		
Elder care leave above state FMLA	11%	13%	14%	12%	11%		
Paid day off for employee's birthday	8%	9%	8%	8%	8%		
Vacation purchase plan	8%	9%	7%	8%	8%		
Emergency flexibility (fixed number of days off with pay for emergencies)	–	–	–	6%	6%		
Paid sabbatical program	6%	5%	5%	5%	5%		
Company-paid group vacations	5%	7%	6%	2%	1%		
Paid jury duty ^A	94%	93%	93%	92%	–		
Paid vacation ^B	86%	82%	84%	82%	–		
Paid sick leave ^B	78%	74%	74%	74%	–		
Paid time off plan ^B	60%	53%	63%	60%	–		
Paid personal days ^B	52%	50%	51%	48%	–		

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.

A Starting in 2009, paid jury duty was changed to paid jury duty above what is required by law.

B In 2009, these paid leave options were mutually exclusive. HR professionals were asked to indicate that their organizations offer either a paid time off plan or a paid vacation plan, paid sick leave plan and/or paid personal leave. This difference accounts for much of the drop seen in paid time off, paid vacation, paid sick leave and paid personal days in 2009.

Note: A dash (–) indicates that this particular benefit was not asked about or was combined with another benefit.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Family-Friendly Benefits

Table E-1 depicts the percentages of human resource professionals who indicated their organizations offered or planned to offer certain family-friendly benefits.

Domestic Partner Benefits

Overall, 16% of HR professionals indicated that their organizations offered some form of domestic partner benefits other than health care. Fourteen percent of

Table E-1	Family-Friendly Benefits	Percentage of organizations that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
	Bring child to work in emergency	29%	3%	*
	On-site lactation/mother's room	25%	0%	*
	Domestic partner benefits for same-sex partners (not including health care coverage)	14%	1%	1%
	Domestic partner benefits for opposite-sex partners (not including health care coverage)	14%	1%	*
	529 plan	14%	0%	0%
	Child care referral service ^A	13%	3%	*
	Elder care referral service ^B	11%	0%	0%
	Adoption assistance	10%	2%	0%
	Access to backup child care services ^C	5%	0%	1%
	Lactation support services ^D	5%	0%	0%
	On-site vaccinations for infants/children	3%	6%	0%
	Subsidized child care center ^E	3%	0%	0%
	Foster care assistance	2%	0%	0%
	Geriatric counseling ^F	2%	0%	0%
	Nonsubsidized child care center ^G	2%	0%	0%
	Parenting workplace seminars	2%	0%	0%
	Access to backup elder care services ^H	1%	0%	0%
	Consortium child care center ^I	1%	0%	0%
	Elder care assisted living assessments	1%	0%	0%
	Elder care in-home assessments	1%	0%	0%
	On-site elder care fairs ^J	1%	0%	0%

(n = 522)

* Less than 1%

A Program that provides employees with the names of child care providers

B Program that provides employees with the names of elder care providers

C For an unexpected event

D Lactation consulting and education

E An on-site or near-site center

F Provides counseling services to seniors and their families

G An on-site or near-site center

H For an unexpected event

I An on-site or near-site center sharing the costs and responsibilities with several companies

J Provides an opportunity for employees to speak directly with elder care experts about the many types of elder care services

Source: 2009 Employee Benefits: A Survey Report by SHRM



HR professionals reported that their organizations offered same-sex domestic partner benefits (excluding health care), and 14% of respondents reported offering opposite-sex domestic partner benefits (excluding health care).

Child Care Benefits

With the majority of single-parent families having a parent in the workforce and about 60% of two-parent families with both parents employed,¹¹ child care benefits are an important recruiting and job satisfaction driver for working parents. Twenty-nine percent of HR professionals reported that their organizations allowed employees to bring their children to work in a child care emergency, and 13% offered a child care referral service.

These types of benefits, which help employees at a minimal cost to the organization, were more commonly offered than costlier benefits such as access to backup child care services¹² (5%), subsidized child care center (3%), nonsubsidized child care center (2%) and consortium child care center (1%), which is a center sharing the costs and responsibilities with several companies.

Dependent Care Educational Assistance

Some organizations provided educational assistance to the dependents of their employees. Fourteen percent of HR professionals reported their organizations offered 529 plans—tax-advantaged savings plans designed to encourage saving for future college costs.

	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
Bring child to work in emergency	27%	22%	29%	31%	29%		
On-site lactation/mother's room	–	–	–	25%	25%		
Domestic partner benefits for same-sex partners (not including health care coverage)	–	–	–	15%	14%		
Domestic partner benefits for opposite-sex partners (not including health care coverage)	–	–	–	14%	14%		
529 plan	–	–	–	14%	14%		
Child care referral service	20%	22%	21%	18%	13%	Decrease	Decrease
Elder care referral service	21%	26%	22%	20%	11%	Decrease	Decrease
Adoption assistance	20%	22%	20%	16%	10%	Decrease	Decrease
Access to backup child care services	–	–	4%	6%	5%		
Lactation support services	–	–	–	6%	5%		
On-site vaccinations for infants/children	–	–	–	3%	3%		
Subsidized child care center	–	–	–	6%	3%		
Foster care assistance	6%	11%	10%	6%	2%		
Geriatric counseling	–	–	–	3%	2%		
Nonsubsidized child care center	–	–	–	4%	2%		
Parenting workplace seminars	–	–	–	4%	2%		
Access to backup elder care services	–	–	4%	5%	1%		
Consortium child care center	–	–	–	1%	1%		
Elder care assisted living assessments	–	–	–	2%	1%		
Elder care in-home assessments	–	–	–	2%	1%		
On-site elder care fairs	–	–	–	1%	1%		

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.

Note: A dash (–) indicates that this particular benefit was not asked about or was combined with another benefit.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Very few organizations that **offered family-friendly benefits** plan on reducing or eliminating these benefits within the next 12 months.

Adoption and Foster Care Assistance

According to responding HR professionals, 10% of organizations offered adoption assistance and 2% provided foster care assistance to their employees.

Elder Care Benefits

According to national research, individuals in slightly more than one out of four U.S. households are involved in the care of an older relative or friend.¹³ Additionally, many of these individuals are part of the “sandwich” generation—caring for young children in addition to their elder care responsibilities. Dependent care flexible spending accounts can be used to offset the cost of both child care and elder care, and some organizations offered elder care options similar to child care benefits. Again, the most frequently offered benefit of this type was an elder care referral service, which 11% of HR professionals indicated was available to employees at their organizations. Less commonly offered elder care benefits included geriatric counseling (2%), emergency elder care services in the case of an unexpected event (1%), elder care assisted living assessments (1%), elder care in-home assessments (1%) and on-site elder care fairs (1%).

Other Family-Friendly Benefits

In addition to child care benefits, elder care benefits, adoption and foster care assistance, organizations offered a number of other benefits that pertained to employees’ dependents. Overall, 26% of HR professionals indicated that their organizations provided benefits to support lactating mothers: one-quarter of HR professionals indicated their organization had an on-site lactation/mother’s room and 5% provided lactation support services. Other family-friendly benefits included on-site vaccinations for infants/children (3%) and parenting workplace seminars (2%).

Family-Friendly Benefits by Organization Staff Size and Organization Sector

Large organizations were most likely to offer many family-friendly benefits. The only exception was a policy of bringing a child to work in an emergency, which was more likely to be offered by small organizations (40%) than by medium (28%) and large (21%) ones. It is possible that smaller organizations might be less formal and are therefore able to be more accommodating in this situation. It is also possible that because large organizations were more likely than small ones to offer child care and access to backup child care services, employees at large organizations were able to utilize these options instead of bringing the child to the office.

HR professionals from publicly owned for-profit organizations were somewhat more likely to indicate that their organizations offered family-friendly benefits.

Family-Friendly Benefits Over the Past Five Years

Table E-2 depicts the percentages of HR professionals indicating the family-friendly benefits their organizations had offered from 2005 through 2009. There were no significant increases in these benefits from 2008 to 2009 and 2005 to 2009.

The following benefits decreased from 2008 to 2009 and 2005 to 2009: child care referral service, elder care referral service and adoption assistance.

29% of HR professionals reported that their organizations **allowed employees to bring their children to work in a child care emergency**, and 13% offered a child care referral service.



Flexible Working Benefits

Flexible working benefits are a cost-effective way to help employees balance their work and personal lives. According to the SHRM 2009 *Job Satisfaction* survey report, 46% of employees cited the flexibility to balance work/life issues as a very important aspect of job satisfaction.¹⁴ These benefits help organizations attract and retain high-quality talent and are a key factor in employee satisfaction.¹⁵

Nontraditional Scheduling Options

Many companies offer nontraditional scheduling options to employees to help them balance their work and personal lives. Fifty-four percent of HR professionals indicated their organizations offered flextime, which allows employees to select their work hours within limits established by the employer.

In addition to flextime, 51% of human resource professionals indicated that their organizations offered some form of telecommuting: 45% of respondents reported that their organizations offered telecommuting on an ad-hoc basis, 34% on a part-time basis and 19% on a full-time basis. Thirty-seven percent of HR professionals said their organizations offered compressed workweeks, where full-time employees are allowed to work longer days for part of a week or pay period in exchange for shorter days or a day off during that week or pay period. Sixteen percent of HR professionals reported that their organizations offered job sharing, in which two employees share the responsibilities, accountability and compensation of one full-time job. These types of flexible scheduling benefits allow organizations to

	Percentage of organizations that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
Casual dress day (one day per week)	59%	2%	0%
Flextime ^A	54%	1%	0%
Telecommuting on an ad-hoc basis ^B	45%	1%	0%
Break arrangements ^C	43%	2%	0%
Mealtime flex ^D	41%	1%	0%
Compressed workweek ^E	37%	1%	0%
Casual dress (every day)	36%	2%	0%
Telecommuting on a part-time basis	34%	2%	0%
Shift flexibility ^F	21%	3%	0%
Telecommuting on a full-time basis	19%	1%	*
Job sharing ^G	16%	2%	*
Seasonal scheduling ^H	16%	1%	1%
Alternating location arrangements ^I	4%	9%	0%
Results-only work environment (ROWE) ^J	3%	0%	0%

(n = 522)

* Less than 1%

A Allowing employees to choose their work hours within limits established by the employer

B Telecommuting on an ad-hoc basis is defined as situations that may occur intermittently throughout the year or as a one-time event

C Employees who generally can only take assigned breaks enter into an arrangement with their employers giving them more flexibility over when they take breaks (e.g., employee who need breaks for health reasons such as diabetics, nursing mothers, etc.)

D Making up time at some point during the day as a result of a longer meal break or allowing employees to leave early as a result of a shorter meal break

E Allowing full-time employees to work longer days for part of the week or pay period in exchange for shorter days or a day off each week or pay period

F Allowing employees to coordinate with co-workers to adjust their schedules by trading, dropping or picking up shifts

G Two or more employees share the responsibilities, accountability and compensation of one full-time job

H Employees work only a certain number of months per year

I Employees work part-year in one location and part-year in a second location (e.g., "snowbirds")

J Allows employees to work wherever and whenever they wish as long as projects are completed on a timely basis

Source: 2009 Employee Benefits: A Survey Report by SHRM



recruit and retain motivated workers who may not be able or willing to work a traditional nine-to-five schedule.

Twenty-one percent of HR professionals indicated that their companies offered shift flexibility, where employees are allowed to coordinate with co-workers to adjust their schedules by trading, dropping or picking up shifts.

Three percent of HR professionals reported their companies had a results-only work environment (ROWE), allowing employees to work wherever and whenever they wish as long as projects are completed on a timely basis.

Casual Dress

Fifty-nine percent of HR professionals indicated that their organizations offered casual dress at least once a week, and 36% allowed casual dress every day. While many companies may consider casual dress part of their organizational culture as opposed to an employee benefit, employees appreciate the opportunity to wear more comfortable clothes.

Break Arrangements

Some organizations offer a variety of benefits designed to help employees provide more flexibility over when they can take breaks. Forty-three percent of respondents indicated providing break arrangements that allow employees who generally can only take assigned breaks with more flexibility over when they take breaks. Forty-one percent offered mealtime flex, which allows employees to make up time at some point during the day as a result of a longer meal break or allows employees to leave early as a result of a shorter meal break.

Other Flexible Working Benefits

According to responding HR professionals, other flexible working benefits included seasonal scheduling (16%) and alternating location arrangements (4%), allowing employees to work part of the year in one location and the rest of the year in another location (e.g., snowbird employees—those who move from colder climates to warmer climates in the winter).

Table F-2 Flexible Working Benefits (by Year)

	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
Casual dress day (one day per week)	55%	62%	66%	62%	59%		
Flextime	56%	57%	58%	59%	54%		
Telecommuting on an ad-hoc basis ^A	–	45%	48%	47%	45%		
Break arrangements	–	–	–	–	43%		
Mealtime flex	–	–	–	44%	41%		
Compressed workweek	33%	35%	38%	37%	37%		
Casual dress days (every day)	41%	38%	37%	38%	36%	Decrease	
Telecommuting on a part-time basis ^A	37%	26%	33%	35%	34%		
Shift flexibility	–	–	–	26%	21%		
Telecommuting on a full-time basis ^A	19%	19%	21%	21%	19%		
Job sharing	19%	18%	20%	18%	16%		
Seasonal scheduling	–	–	–	–	16%		
Alternating location arrangements	–	–	–	–	4%		
Results only work environment (ROWE)	–	–	–	–	3%		

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.

^A Starting in 2006, telecommuting on an ad-hoc basis was added.

Note: A dash (–) indicates that this particular benefit was not asked about or was combined with another benefit.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Flexible Working Benefits by Organization Staff Size and Organization Sector

With the exception of daily casual dress, larger organizations were significantly more likely than smaller organizations to offer many of these benefits. There were considerable differences by sector in what flexible working benefits were offered. Government agencies were more likely to offer telecommuting on a full-time basis and a compressed work week. All results by organization staff size and organization sector are displayed in the appendix.

Flexible Working Benefits Over the Past Five Years

Table F-2 shows the percentages of human resource professionals who indicated that their organizations offered flexible working benefits from 2005 through 2009. There were no significant changes in these benefits from 2008 to 2009.

Did you know? Within the last six months, the financial challenges to the U.S. and global economy resulted in 71% percent of organizations making budget cuts across the entire organization.

Source: SHRM Poll, March 2009

51% of human resource professionals indicated that **their organizations offered some form of telecommuting.**

The only significant decrease from 2005 was the percentage of organizations that offered casual dress every day (41% in 2005 compared with 36% in 2009).

Defraying the Cost of Commuting: A Multipronged Approach Astron Solutions, New York City

Astron Solutions is a human resource consulting firm that specializes in total rewards. Over the past few years, the company has looked at different benefits strategies that combine sustainability with helping employees manage their work/life balance and reduce commuting costs. A good example of this is the company's participation in New York City's transit check program. Because the company is located in Manhattan, there are many public transportation options available for employees. Each employee who cannot walk to work due to distance from the office is enrolled in the transit check program, which is an automatic tax-free deduction from paychecks to be used on NYC/MTA and New Jersey Transit public transportation. The official program for smaller companies involved giving each employee a new debit card or subway pass each month, but Astron Solutions wanted a more streamlined and greener option. Working with TransitCenter, Astron Solutions was able switch its employees to an annual transit card that can be topped up and used throughout the year. Employees are also given the option of a flexible work schedule, such as a four-day 10-hour schedule. This also helps to reduce commuting costs and time.

Some of the employees are also integrating their transportation options with the company's wellness program. The organization reimburses employees up to \$200 each year for preventive health products and services such as gym memberships. Employees also have the option to use this reimbursement to help purchase a bike, which many use to commute to work. Astron received two 2008 Small Business Regional Choice Commuter Awards for Outstanding Achievement and Regional Leadership for this creative combination. This blend of wellness, sustainability and flexible working options demonstrates that when benefits are leveraged in the right way, they can have multiple positive outcomes for employees, the organization and the environment.



Personal Services Benefits

Personal services benefits range from professional development opportunities to pet health insurance. Table G-1 shows the 26 personal services benefits included in this report and the percentages of HR professionals who indicated that their organizations offered each of them.¹⁶

Career Development Assistance

Organizations offer a variety of benefits designed to help employees advance in their careers. These types of benefits provide a dual advantage—employees feel the organization cares about their professional development, and the organization gains a richer,

Table G-1 Personal Services Benefits

	Percentage of organizations that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
Direct deposit	99%	2%	*
Professional development opportunities ^A	91%	6%	*
Professional memberships	91%	5%	0%
Certification/recertification fees	77%	3%	0%
Professional license application or renewal fees	73%	3%	0%
Cross-training to develop skills not directly related to the job	49%	2%	1%
Free/discounted uniforms	29%	3%	*
Organization-sponsored sports teams	25%	7%	1%
Mentoring program ^B	22%	3%	1%
Postal services for employees	22%	2%	0%
Food services/subsidized cafeteria	21%	3%	*
Legal assistance/services	21%	1%	0%
On-site ATMs	20%	2%	0%
Executive club memberships	19%	9%	0%
Travel planning services	16%	5%	0%
Career counseling	14%	0%	3%
College/school selection/referral ^C	11%	4%	0%
Dry cleaning services	10%	0%	0%
Employer-sponsored personal shopping discounts	8%	2%	1%
Self-defense training	6%	0%	1%
ESL (English as a second language) classes	6%	17%	*
Foreign language classes ^D	5%	4%	*
Concierge services	3%	0%	*
Pet health insurance	3%	0%	0%
Prepared take-home meals	1%	0%	0%
On-site haircuts	1%	0%	0%

(n = 522)

* Less than 1%

^A Seminars, conferences, courses, training to keep skills current, etc.

^B Formal program

^C Provides employees with information and helps link them to colleges

^D Non-English

Source: 2009 Employee Benefits: A Survey Report by SHRM



Personal services benefits look to remain stable in 2009, but a few organizations do have plans to make some reductions to these benefits within the next 12 months.

better-prepared workforce. Ninety-one percent of HR professionals said their organizations offered professional development opportunities such as seminars, conferences or courses to their staff, and 91% offered paid professional memberships. Seventy-seven percent reported paying for certification or recertification fees, and 73% indicated that their

organizations paid for professional license application or renewal fees.

Almost one half of respondents (49%) indicated that their organizations offered cross-training to develop skills not directly related to their employees' current jobs. In addition to furthering employees' skill sets, this can increase understanding and communication

Table G-2 Personal Services Benefits (by Year)

	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
Direct deposit	97%	98%	98%	97%	99%		
Professional development opportunities	93%	95%	96%	95%	91%		
Professional memberships	93%	90%	91%	91%	91%		
Certification/recertification fees	–	–	–	76%	77%		
Professional license application or renewal fees	–	–	78%	77%	73%		
Cross-training to develop skills not directly related to the job	46%	49%	48%	55%	49%		Decrease
Free/discounted uniforms	33%	32%	32%	30%	29%		
Organization-sponsored sports teams	31%	29%	29%	27%	25%	Decrease	
Mentoring program	19%	23%	26%	25%	22%		
Postal services for employees	25%	23%	26%	24%	22%		
Food services/subsidized cafeteria	24%	22%	26%	24%	21%		
Legal assistance/services	24%	27%	33%	24%	21%		
On-site ATMs	–	–	–	17%	20%		
Executive club memberships	27%	28%	24%	23%	19%	Decrease	
Travel planning services	21%	23%	22%	21%	16%		
Career counseling	–	–	–	–	14%		
College/school selection/referral	9%	13%	12%	14%	11%		
Dry cleaning services	12%	13%	13%	13%	10%		
Employer-sponsored personal shopping discounts	10%	11%	12%	11%	8%		
Self-defense training	6%	6%	6%	5%	6%		
English as a second language (ESL) classes	6%	11%	11%	8%	6%		
Foreign (non-English) language classes	9%	10%	12%	9%	5%		
Concierge services	3%	4%	5%	5%	3%		
Pet health insurance	5%	5%	5%	7%	3%		
Prepared take-home meals	2%	3%	3%	3%	1%		
On-site haircuts	–	–	–	–	1%		

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.

Note: A dash (–) indicates that this particular benefit was not asked about or was combined with another benefit.

Source: 2009 Employee Benefits: A Survey Report by SHRM



between different departments. In addition, 22% of organizations offered formal mentoring programs, 14% provided career counseling, and 11% offered college/school selection/referrals, providing employees with information and helping to link them to colleges.

Work/Life Balance Benefits

Some of the benefits in this category are designed to save employees the time and energy of having to schedule such everyday tasks as visiting the bank (97% of respondents said their organizations offered direct deposit), going to the post office (22% offered postal services), preparing meals (21% offered food services or a subsidized cafeteria, and 1% offered prepared take-home meals) or going to the dry cleaner (10% offered dry cleaning services). In addition, 20% reported their organizations had on-site ATMs, and 1% provided on-site haircuts. Other benefits, such as legal assistance or services (21%), travel planning services (16%) and concierge services (3%), help employees in more specific circumstances.

Uniform Benefits

Some employees are required to wear certain attire while working, and employers may offer assistance in paying for it. Almost one-third of HR professionals (29%) indicated that their organizations offered free or discounted uniforms to employees.

Language Skills

Some organizations offer English as a second language (ESL) classes to workers looking to improve their English language skills. Six percent of HR professionals indicated their organizations offered this benefit.

An increasingly diverse workforce and the globalization of the economy have made language skills more important than ever. Workers, supervisors, customers and business partners may have different levels of English proficiency, and some may not speak English at all. To address this divide, some organizations offer foreign language classes to workers or supervisors who frequently deal with

individuals whose native language is not English. Five percent of HR professionals reported that their organizations offered some form of foreign language classes.

Other Personal Services Benefits

One-quarter of HR professionals indicated that their companies offered organization-sponsored sports teams. In addition to physical exercise and health benefits, sports teams offer employees a chance to socialize and build rapport with fellow employees outside of their work environment.

According to responding HR professionals, other personal services offered by organizations included executive club memberships (19%), employer-sponsored personal shopping discounts (8%), self-defense training (6%) and pet health insurance (3%).

Personal Services Benefits by Organization Staff Size and Organization Sector

Again, larger organizations were more likely than smaller organizations to offer many personal services benefits. Likewise, publicly owned for-profit organizations were more likely to offer many of these benefits. All results by organization staff size and organization sector are displayed in the appendix.

Personal Services Benefits Over the Past Five Years

Table G-2 shows the percentages of human resource professionals who indicated that their organizations offered personal services benefits from 2005 through 2009. Cross-training to develop skills not directly related to the job was the only benefit that was offered by fewer organizations in 2009 when compared with 2008.

Only two benefits were offered by fewer organizations in 2009 than in 2005: organization-sponsored sports teams (31% in 2005 compared with 25% in 2009) and executive club memberships (27% in 2005 compared with 19% in 2009).

Almost one-half of respondents (49%) indicated that their organizations offered cross-training to develop skills not directly related to their employees' current jobs.



Housing and Relocation Benefits

Occasionally, organizations may provide some assistance when employees or new hires are required to relocate. Additionally, some organizations provide benefits that assist employees in acquiring homes. Table H-1 depicts the prevalence of various housing and relocation benefits.¹⁷

One-Time Permanent Relocation Benefits

Most housing and relocation benefits involve newly hired or transferred employees who face a one-time, permanent move. Thirty percent of HR professionals noted that their organizations offered this benefit. Some employers prefer this option because providing a single lump sum to the relocating employee eliminates paperwork and administration for the organization.

Thirty-six percent of HR professionals indicated that their organizations provided location visit assistance or house-hunting trips to employees who were relocating to a new area.

Additionally, 13% of HR professionals indicated their organizations offered assistance to employees who needed to sell a home at their original location. Fifteen percent of respondents indicated that they offered a cost-of-living differential to assist employees relocating to a more expensive area, and 15% offered spouse relocation assistance to help married employees whose “trailing” spouse might be faced with searching for a job in an unfamiliar location. Six percent reported their organizations offered reimbursement for financial loss sustained from a home sale.

Temporary Relocation Benefits

Temporarily relocated employees are often essentially maintaining two households—one at the permanent location to which they plan to return and one to maintain a comfortable presence at their temporary location. Organizations sometimes offer provisional relocation benefits to assist in easing this burden.

36% of HR professionals indicated that their organizations provided **location visit assistance or house-hunting trips** to employees who were relocating to a new area.

Table H-1

Housing and Relocation Benefits

	Percentage of organizations that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
Location visit assistance ^A	36%	2%	0%
Temporary relocation benefits	35%	4%	0%
Relocation lump sum payment	30%	3%	*
Cost-of-living differential	15%	3%	0%
Spouse relocation assistance	15%	3%	*
Assistance selling previous home	13%	3%	*
Rental assistance	12%	5%	0%
Housing counseling ^B	9%	0%	*
Home insurance program ^C	7%	0%	1%
Mortgage assistance	7%	3%	1%
Down payment assistance	6%	0%	0%
Reimbursement for financial loss sustained from a home sale	6%	7%	*
Renter insurance program ^D	4%	0%	1%
Mortgage insurance	3%	0%	*

(n = 522)

* Less than 1%

A House-hunting trips

B Advice on buying, renting, defaults and foreclosures

C Discount off home insurance

D Discount off renters insurance

Source: 2009 Employee Benefits: A Survey Report by SHRM



Thirty-five percent of HR professionals indicated that their organizations offered temporary relocation benefits.

Housing Assistance

Some organizations offer employees assistance in purchasing a new home. Seven percent of HR professionals indicated that their organizations offered mortgage assistance, and 6% offered down payment assistance. These benefits may be offered as part of a relocation package or as a general employee benefit to increase retention. Most organizations that offer these types of benefits require employees to have certain tenure and/or stay for a certain period of time after receiving the assistance. Organizations also hope that homeowners may feel more rooted in the community and therefore less likely to leave.

Additional housing and relocation benefits offered by respondents' organizations were rental assistance (12%), housing counseling (9%), home insurance program (7%) and renter insurance program (4%).

Housing and Relocation Benefits by Organization Staff Size and Organization Sector

Overall, larger organizations were significantly more likely to offer housing and relocation benefits. Once again, publicly owned for-profit organizations were more likely to offer the majority of these benefits. All results by organization staff size and organization sector are displayed in the appendix.

Housing and Relocation Benefits Over the Past Five Years

Table H-2 shows the percentages of human resource professionals who indicated that their organizations offered these housing and relocation benefits from 2005 through 2009. Compared with 2008, cost-of-living differential, rental assistance and temporary relocation benefits were offered by fewer organizations. The following benefits were offered by fewer organizations in 2009 than in 2005: assistance selling previous home, cost-of-living differential, mortgage assistance, rental assistance and temporary relocation benefits.

39% of HR professionals reported that their organizations offered travel accident insurance, providing coverage for individuals who might be harmed or killed while on business travel.

	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
Location visit assistance	41%	40%	40%	39%	36%		
Temporary relocation benefits	43%	43%	42%	40%	35%	Decrease	Decrease
Relocation lump sum payment ^A	-	-	-	-	30%		
Cost-of-living differential	23%	19%	22%	20%	15%	Decrease	Decrease
Spouse relocation assistance	21%	21%	21%	19%	15%		
Assistance selling previous home	23%	20%	19%	17%	13%	Decrease	
Rental assistance	21%	22%	19%	17%	12%	Decrease	Decrease
Housing counseling	-	-	-	11%	9%		
Home insurance program	8%	8%	7%	6%	7%		
Mortgage assistance	13%	12%	12%	10%	7%	Decrease	
Down payment assistance	9%	11%	11%	9%	6%		
Reimbursement for financial loss sustained from a home sale	-	-	-	-	6%		
Renter insurance program	-	-	-	-	4%		
Mortgage insurance	4%	5%	5%	4%	3%		
Overall relocation fee ^A	43%	40%	42%	40%	-		

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.

^A Starting in 2009, overall relocation fee was changed to relocation lump sum payment.

Note: A dash (-) indicates that this particular benefit was not asked about or was combined with another benefit.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Business Travel Benefits

Did you know? 69% of employees said their organization's HR department had been helpful or very helpful in preserving their organization's benefits package during the downturn.

Source: SHRM Employee Omnibus Survey, January 2009

When employees travel for business, companies often provide additional benefits to make up for incidental costs and inconvenience associated with

being away from home. Table I-1 depicts the 19 business travel benefits.¹⁸

Business travel benefits come in many forms. The most frequently offered benefits involved either reimbursement for expenses incurred while traveling or additional compensation for time spent on business travel.

Travel Expenses

The most commonly offered business travel benefits included allowing employees to keep frequent flyer miles (68%) and hotel points (68%) earned while traveling for business and put them toward personal use, providing per diem for meals (65%), providing business laptop (63%) for personal use while on

Table I-1 Business Travel Benefits

	Percentage of organizations that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
Employee keeps frequent flyer miles	68%	1%	0%
Employee keeps hotel points	68%	1%	0%
Per diem for meals	65%	3%	0%
Business laptop for personal use while on travel	63%	2%	0%
Paid long-distance calls home while on business travel	58%	3%	0%
Paid Internet access while on travel	54%	2%	0%
Travel accident insurance	39%	2%	0%
Car or limo service to/from airport	37%	4%	0%
Paid dry cleaning while on business travel	15%	4%	0%
First or business class airfare	12%	14%	0%
Rental car upgrades	11%	7%	0%
Paid minibar snacks at hotel	9%	2%	0%
Additional pay for weekend travel ^A	7%	0%	0%
Paid pay-per-view movies at hotel	5%	8%	0%
Paid travel expenses for spouse	5%	4%	0%
Paid airline club membership	4%	5%	0%
Paid health club fees while on travel	3%	0%	0%
Child care expenses while on business travel	2%	0%	0%
Pet care arrangements while on business travel	1%	0%	0%

(n = 522)

* Less than 1%

^A Beyond what is required by law for nonexempt employees

Source: 2009 Employee Benefits: A Survey Report by SHRM



travel and paying for long-distance calls home while employees were away (58%). A smaller number of HR professionals indicated that their organizations paid or reimbursed employees for dry cleaning expenses (15%), first class/business class airfare (12%), rental car upgrades (11%), minibar snacks at the hotel (9%), pay-per-view movies (5%), health club fees (3%), child care expenses (2%) and pet care arrangement expenses (1%) incurred while employees were on business travel.

Additional Pay

Seven percent of HR professionals indicated that their organizations offered supplementary pay for weekend travel beyond what is required by law for nonexempt employees.

Other Business Travel Benefits

Thirty-nine percent of HR professionals reported that their organizations offered travel accident

insurance, providing coverage for individuals who might be harmed or killed while on business travel.

Less commonly offered travel benefits included paid travel expenses for a spouse (5%) and paid airline club memberships (4%).

Business Travel Benefits by Organization Staff Size and Organization Sector

There were no significant differences in these benefits by organization size. Overall, HR professionals from privately and publicly owned for-profit organizations were more likely to indicate their organizations offered business travel benefits. The only exception was per diem for meals: HR professionals from government organizations were more likely to offer this benefit. All results by organization staff size and organization sector are displayed in the appendix.

Table I-2 Business Travel Benefits (by Year)

	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
Employee keeps frequent flyer miles	69%	68%	71%	71%	68%		
Employee keeps hotel points	–	–	–	70%	68%		
Per diem for meals	67%	69%	70%	70%	65%		Decrease
Business laptop for personal use while on travel	–	–	–	–	63%		
Paid long-distance calls home while on business travel	68%	70%	67%	62%	58%	Decrease	
Paid Internet access while on travel	–	–	–	–	54%		
Travel accident insurance	44%	45%	46%	42%	39%	Decrease	
Car or limo service to/from airport	–	–	–	–	37%		
Paid dry cleaning while on business travel	19%	20%	22%	20%	15%		Decrease
First or business class airfare	–	–	–	11%	12%		
Rental car upgrades	–	–	–	17%	11%		Decrease
Paid minibar snacks at hotel	14%	18%	16%	14%	9%	Decrease	Decrease
Additional pay for weekend travel	9%	10%	10%	9%	7%		
Paid pay-per-view movies at hotel	7%	10%	9%	7%	5%		
Paid travel expenses for spouse	4%	8%	6%	6%	5%		
Paid airline club membership	8%	9%	8%	7%	4%		
Paid health club fees while on travel	5%	7%	6%	5%	3%		
Child care expenses while on business travel	3%	2%	1%	2%	2%		
Pet care arrangements while on business travel	–	2%	1%	1%	1%		

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.

Note: A dash (–) indicates that this particular benefit was not asked about or was combined with another benefit.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Did you know?

Morale and team-building activities (including company picnics and holiday parties) are the HR-related costs most likely to be cut in the downturn.

Source: SHRM Poll, October 2008

Business Travel Benefits Over the Past Five Years

Table I-2 shows the percentages of human resource professionals who indicated that their organizations offered these business travel benefits from 2005

through 2009. The following benefits were offered by fewer organizations in 2009 when compared with 2008: paid dry cleaning while on business travel (15% in 2009 compared with 20% in 2008), paid minibar snacks at hotel (9% in 2009 compared with 14% in 2008), per diem for meals (65% in 2009 compared with 70% in 2008) and rental car upgrades (11% in 2009 compared with 17% in 2008).

Paid long-distance calls home while on business travel, paid minibar snacks at hotel and travel accident insurance were the benefits offered by fewer organizations in 2009 compared with 2005.

Within the next 12 months, a number of organizations have plans to **reduce or eliminate** holiday parties, company picnics and company-purchased tickets.

Other Benefits

Table J-1 shows the percentages of human resource professionals whose organizations offered nine other benefits that did not fit into one of the nine previous categories.¹⁹

Social Gatherings

Social gatherings provide the opportunity for employees to get to know one another outside of the job, which can help lead to better working relationships at the office. Eighty-one percent of HR professionals reported that their organizations offered holiday parties, and 59% said they had company picnics. Forty percent of respondents reported that their organizations offered discount ticket services, and 38% offered company-purchased tickets to events such as cultural proceedings, sporting events or theme parks.

Volunteer Programs

Community volunteer programs offer organizations an excellent opportunity to provide value-added

benefits to the business, employees and community. These programs can be tailored to best suit the organization's mission, vision and business goals. Forty-two percent of HR professionals reported their organizations offered community volunteer programs.

Employee Recognition

Some benefits provide employee recognition. Seventy percent of HR professionals indicated that their organizations rewarded milestones such as birthdays and service anniversaries. Additionally, more than one-half (51%) said their organizations offered some type of noncash, companywide performance awards, such as gift certificates or an extra day off.

Other Benefits

Other benefits included take your child to work day (33%), allowing pets at the office (6%), take your parents to work day (1%) and take your pet to work day (1%).



Other Benefits by Organization Staff Size and Organization Sector

With the exception of holiday parties, larger organizations were more likely than smaller organizations to offer many of these benefits. HR professionals from privately and publicly owned for-profit organizations were more likely to indicate their organizations offered many of these benefits. All results by organization staff size and organization sector are displayed in the appendix.

Other Benefits Over the Past Five Years

Table J-2 shows the percentages of HR professionals who indicated that their organizations offered these benefits from 2005 through 2009. Community volunteer programs, discount ticket services and noncash, companywide performance awards were the benefits offered by fewer organizations in 2009 compared with 2008. The only benefit that significantly decreased since 2005 was take your child to work day.

	Percentage of organizations that offer the benefit	Offer the benefit but have plans to reduce or eliminate the benefit within the next 12 months	Do not offer the benefit but have plans to within the next 12 months
Holiday parties	81%	15%	0%
Milestone rewards ^A	70%	4%	0%
Company picnic	59%	11%	1%
Noncash, companywide performance awards ^B	51%	7%	1%
Community volunteer programs	42%	2%	1%
Discount ticket services ^C	40%	3%	0%
Company-purchased tickets ^C	38%	15%	0%
Take your child to work day	33%	4%	1%
Pets at work	6%	0%	0%
Take your parent to work day	1%	0%	1%
Take your pet to work day ^D	1%	0%	0%

(n = 522)

* Less than 1%

A For example, lunch on birthday, gift certificate recognizing years of service, etc.

B For example, gift certificate, extra day off

C For example, sporting events, cultural events, theme parks, etc.

D Once a year as opposed to pets at work generally

Source: 2009 Employee Benefits: A Survey Report by SHRM

	2005	2006	2007	2008	2009	Differences between 2005 and 2009*	Differences between 2008 and 2009*
Holiday parties	81%	87%	85%	83%	81%		
Milestone rewards	67%	76%	75%	74%	70%		
Company picnic	60%	66%	64%	62%	59%		
Noncash, companywide performance awards	54%	56%	54%	56%	51%		Decrease
Community volunteer programs	–	–	–	48%	42%		Decrease
Discount ticket services	–	–	–	45%	40%		Decrease
Company-purchased tickets	39%	43%	42%	41%	38%		
Take your child to work day	41%	38%	37%	35%	33%	Decrease	
Pets at work	4%	4%	6%	5%	6%		
Take your parent to work day	–	–	–	1%	1%		
Take your pet to work day	–	–	–	–	1%		

* Indicates a significant change from 2008 to 2009 or from 2005 to 2009. Blank cells in the last two columns indicate that no statistically significant differences were found.

Note: A dash (–) indicates that this particular benefit was not asked about or was combined with another benefit.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Conclusions

A recent survey of U.S. employers and employees revealed that because of the recent economic events, 46% of employees are taking a greater interest in understanding the benefits they receive through the workplace.²⁰ With employees now paying more attention to these benefits, there is an opportunity for organizations to help a more engaged workforce fully understand all of their options and the true value of their benefits package.

The 2009 Employee Benefits Survey revealed a relatively small decrease from 2008 to 2009 in the percentage of organizations offering various benefits. This is not surprising, because many organizations indicated they were feeling the impact of the severe recession and global financial crisis. The areas that experienced the biggest downward trend since

2008 were health care and welfare, housing and relocation, and business travel benefits. The fact that organizations have not made drastic decreases in their benefits offerings is a promising sign and displays the importance of benefits to employees and employers. It is important to note that some of the changes uncovered in this report appear to have been in response to the changes in the economy, but other changes represent shifts that have gradually occurred over the last several years. As the make-up of the workforce and office dynamics continue to evolve, so will employee expectations regarding benefits. HR professionals will need to keep these shifts in mind when developing and updating people strategies such as benefits offerings.

With employees now paying more attention to these benefits, there is an opportunity for organizations to help **a more engaged workforce** fully understand all of their options and the true value of their benefits package.

Methodology

A sample of HR professionals was randomly selected from SHRM's membership database, which included approximately 250,000 individual members at the time the survey was conducted. Only members who had not participated in a SHRM survey or poll in the last four months were included in the sampling frame. Members who were students, located internationally or had no e-mail address on file were excluded from the sampling frame. In February 2009, an e-mail that included a hyperlink to the Employee Benefits Survey²¹ was sent to 3,000 randomly selected SHRM members. Of these, 2,710 e-mails were successfully delivered to respondents, and 522 HR professionals responded, yielding a response rate of 19%. The survey was accessible for a period of three weeks, and seven e-mail reminders were sent to nonrespondents in an effort to increase response rates. The sample of HR professionals was generally representative of the SHRM membership population.

The report is composed of 10 benefits sections: health care and welfare benefits, preventive health and wellness benefits, financial and compensation

benefits, paid leave benefits, family-friendly benefits, flexible working benefits, personal services benefits, housing and relocation benefits, business travel benefits, and other benefits. Each section has two tables in the body of the report. Table 1 displays the overall percentage of organizations that offer each benefit, the percentage of organizations that offer the benefit now but have plans to reduce or eliminate the benefit within the next 12 months and the percentage of organizations that do not offer the benefit now but have plans to do so within the next 12 months. Table 2 illustrates the percentage of organizations offering benefits on an annual basis over a period of five years. In the appendix, Table 3 presents data by organization staff size, as defined by the number of employees at the respondent's location. Organization staff size is broken into three groups: small (1-99 employees), medium (100-499 employees) and large (500 or more employees). Table 4 presents data by organization sector. Organization sector is broken into four groups: publicly owned for-profit organization, privately owned for-profit organization, nonprofit organization and government sector.



A number of benefits have been added, changed or dropped from 2008 to 2009. Forces driving the changes include many articles published by the news media, SHRM's own research of benefits trends, a need for clarification of some represented benefits and member input. New or edited items are footnoted throughout the report.

Notations

Analysis

Analyses by HR professionals' staff size and employment sector are presented and discussed, when applicable. In some cases, the data are not depicted in corresponding tables/figures even though the results are statistically significant.

- ◆ Organization staff size categories: small (1 to 99 employees), medium (100 to 499 employees) and large (500 or more employees). The analysis by staff size refers to the number of full-time employees at the HR professional's work location only.
- ◆ Organization sector: publicly owned for-profit organization, privately owned for-profit organization, nonprofit organization, government sector and other. Results are not presented for "other" employment category due to the small number of organizations in this category.

Differences

Conventional statistical methods were used to determine if observed differences were statistically significant (i.e., there is a small likelihood that the differences occurred by chance). Therefore, in most cases, only results that were significant are included, unless otherwise noted. In some cases, data may be discussed in the text of this report but not presented in an accompanying figure or table.

Tables

Unless otherwise noted, the following are applicable to data depicted in tables throughout this report.

- ◆ Percentages for a question or a response option may not total 100% due to rounding.
- ◆ The sample size is based on the actual number of respondents by organization sector and organiza-

tion staff size who answered the question using the response options provided.

- ◆ Data are sorted in descending order by the first percentage column in a table.

Figures

Unless otherwise noted in a specific figure, percentages for a question may not total 100% due to rounding.

Generalization of Results

As with any research, readers should exercise caution when generalizing results and take individual circumstances and experiences into consideration when making decisions based on these data. While SHRM is confident in its research, it is prudent to understand that the results presented in this survey report are only truly representative of the sample of HR professionals responding to the survey.

Number of Respondents

The number of respondents (indicated by "n" in figures and tables) varies from table to table and figure to figure because some respondents did not answer all of the questions. Individuals may not have responded to a question on the survey because the question or some of its parts were not applicable or because the requested data were unavailable. This also accounts for the varying number of responses within each table or figure.

Confidence Level and Margin of Error

A confidence level and margin of error give readers some measure of how much they can rely on survey responses to represent all SHRM members. Given the level of response to the survey, SHRM Research is 96% confident that responses given by responding HR professionals can be applied to all SHRM members, in general, with a margin of error of approximately 4%. For example, 59% of HR professionals reported their organizations offered wellness programs. With a 4% margin of error, the reader can be 96% certain that between 55% and 63% of SHRM members would report that their organizations presently offer wellness programs.



About the Respondents

Organization Staff Size

Small (1–99 employees)	29%
Medium (100–499 employees)	42%
Large (500 and more employees)	30%

(n = 500)

Organization Sector

Privately owned for-profit organization	52%
Publicly owned for-profit organization	19%
Nonprofit organization	17%
Government agency	11%

(n = 498)

Organization Industry

Manufacturing	15%
Services—professional, scientific, technical, legal, engineering	10%
Government/public administration—federal, state/local, tribal	9%
Health care, social assistance (e.g., in-home care, nursing homes, EAP providers, hospices, etc.)	9%
Financial services (e.g., banking)	8%
Educational services/education	5%
Other services	5%
Construction, mining, oil and gas	4%
Consulting	4%
Transportation, warehousing (e.g., distribution)	4%
High-tech	3%
Insurance	3%
Retail/wholesale trade	3%
Services—accommodation, food and drinking places	3%
Biotech	2%
Real estate, rental, leasing	2%
Utilities	2%
Arts, entertainment, recreation	1%
Association—professional/trade	1%
Pharmaceutical	1%
Publishing, broadcasting, other media	1%
Telecommunications	1%
Other	3%

(n = 492)

Region

Midwest (Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin)	34%
South (Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia)	27%
West (Alaska, Arizona, California, Colorado, Hawaii, Idaho, Nevada, New Mexico, Montana, Oregon, Utah, Washington, Wyoming)	20%
Northeast (Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont)	19%

(n = 483)



Appendix: Benefits by Organization Staff Size and Organization Sector

	Overall	Small (1–99 Employees)	Medium (100–499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Prescription drug program coverage	96%	94%	97%	97%	
Dental insurance	96%	91%	98%	98%	Large > small
Mail-order prescription program	91%	83%	87%	90%	
Preferred provider organization (PPO) plan	81%	77%	80%	88%	Large > small
Chiropractic coverage	80%	74%	84%	80%	
Mental health coverage	80%	72%	83%	84%	Large, medium > small
Accidental death and dismemberment insurance (AD&D)	78%	76%	77%	80%	
Long-term disability insurance	77%	77%	72%	82%	
Vision insurance	76%	63%	74%	91%	Large > medium, small Medium > small
Employee assistance program (EAP)	75%	66%	75%	88%	Large > medium, small Medium > small
Medical flexible spending account	71%	64%	69%	81%	Large > medium, small
Dependent care flexible spending account	70%	60%	69%	80%	Large > medium, small
Short-term disability insurance	70%	67%	70%	72%	
Contraceptive coverage	66%	67%	62%	71%	
Life insurance for dependents	58%	44%	57%	73%	Large > medium, small Medium > small
Health care premium flexible spending account	43%	38%	46%	53%	Large > medium, small
Supplemental accident insurance	40%	37%	41%	42%	
Long-term care insurance	39%	32%	39%	46%	Large > small
Health care coverage for dependent grandchildren	37%	30%	35%	45%	Large > medium, small Medium > small
Domestic partner health care coverage (opposite-sex)	37%	34%	38%	36%	
Rehabilitation assistance	37%	42%	32%	39%	Small > medium
Domestic partner health care coverage (same-sex)	36%	29%	34%	42%	Large > small
HMO (health maintenance organization) plan	35%	32%	33%	40%	
Health care coverage for part-time workers	35%	31%	27%	53%	Large > medium, small
Intensive care insurance	35%	39%	34%	34%	
Critical illness insurance	34%	40%	33%	29%	Small > large
Cancer insurance	33%	27%	38%	32%	

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Table A-3 Health Care and Welfare Benefits (by Organization Staff Size) (continued from page 47)

Health savings account (HSA)	32%	27%	30%	39%	Large > small
Surcharges for spousal health care coverage	32%	31%	30%	38%	
Health care coverage for foster children	31%	26%	27%	41%	Large > small
Infertility treatment coverage (other than in-vitro fertilization)	30%	23%	28%	36%	Large > small
Bariatric coverage for weight loss	29%	18%	33%	35%	Large > medium, small
Acupressure/acupuncture medical coverage	28%	28%	29%	27%	
Health reimbursement account (HRA)	26%	23%	26%	26%	
Point of service (POS) plan	26%	23%	29%	26%	
Retiree health care coverage	26%	15%	25%	39%	Large > medium, small
In-vitro fertilization coverage	23%	19%	21%	31%	Large > small
Hospital indemnity insurance	23%	22%	24%	21%	
Laser-based vision correction coverage	19%	13%	20%	23%	Large > small
Pharmacy management program	18%	13%	17%	22%	
Wholesale generic drug program for injectable drugs	17%	17%	18%	17%	
Alternative/complementary medical coverage	16%	18%	13%	16%	
Employer-matched contributions to a health saving account (HSA)	15%	15%	15%	15%	
Grief recovery program	15%	18%	13%	14%	
Consumer-directed health care plan (CDHP)	12%	8%	10%	18%	Large > small
Support groups	12%	12%	13%	11%	
Exclusive provider organization (EPO) plan	8%	5%	7%	14%	
Indemnity plan (fee-for-service)	7%	3%	8%	9%	
Elective procedures coverage (other than laser-based vision correction coverage)	5%	2%	5%	9%	
Experimental/elective drug coverage	3%	3%	2%	5%	
Subsidized cost of elder care	3%	2%	3%	4%	
Gender reassignment surgery coverage	1%	1%	1%	2%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table A-4 Health Care and Welfare Benefits (by Organization Sector)

	Overall	Privately Owned For-Profit Organization	Publicly Owned For-Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Prescription drug program coverage	96%	96%	97%	97%	95%	
Dental insurance	96%	95%	99%	94%	100%	
Mail-order prescription program	91%	91%	91%	92%	93%	
Preferred provider organization (PPO) plan	81%	79%	87%	74%	91%	Govt > NP
Chiropractic coverage	80%	80%	82%	73%	86%	
Mental health coverage	80%	75%	84%	84%	89%	
Accidental death and dismemberment insurance (AD&D)	78%	74%	85%	78%	77%	
Long-term disability insurance	77%	74%	93%	73%	68%	Public(FP) > Private(FP), NP Govt > NP
Vision insurance	76%	74%	85%	65%	84%	Public(FP), Govt > NP
Employee assistance program (EAP)	75%	69%	91%	77%	84%	Public(FP) > Private(FP)
Medical flexible spending account	71%	65%	81%	76%	79%	Public(FP) > Private(FP)
Dependent care flexible spending account	70%	61%	86%	70%	79%	Public(FP) > Private(FP), NP
Short-term disability insurance	70%	70%	87%	69%	45%	Public(FP) > Private(FP), NP, Govt Private(FP), NP > Govt
Contraceptive coverage	66%	63%	76%	62%	73%	
Life insurance for dependents	58%	54%	76%	45%	66%	Public(FP) > Private(FP), NP, Govt Govt > NP
Health care premium flexible spending account	43%	42%	32%	48%	48%	NP, Govt > Public(FP)
Supplemental accident insurance	40%	37%	49%	40%	36%	
Long-term care insurance	39%	32%	48%	37%	54%	Govt > Private(FP), NP, Public(FP) > Private(FP)
Health care coverage for dependent grandchildren	37%	35%	42%	31%	43%	
Domestic partner health care coverage (opposite-sex)	37%	32%	47%	43%	27%	Public(FP) > Govt
Rehabilitation assistance	37%	35%	41%	37%	43%	
Domestic partner health care coverage (same-sex)	36%	31%	52%	34%	29%	Public(FP) > Private(FP), NP, Govt
HMO (health maintenance organization) plan	35%	28%	42%	36%	46%	Govt > Private(FP)
Health care coverage for part-time workers	35%	26%	44%	52%	39%	NP > Private(FP),
Intensive care insurance	35%	38%	33%	24%	43%	Govt > NP
Critical illness insurance	34%	33%	35%	35%	32%	
Cancer insurance	33%	34%	26%	30%	39%	
Health savings account (HSA)	32%	30%	43%	29%	29%	
Surcharges for spousal health care coverage	32%	30%	26%	44%	34%	NP > Public(FP)

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Table A-4 Health Care and Welfare Benefits (by Organization Sector) (continued from page 49)

Health care coverage for foster children	31%	25%	42%	26%	50%	Govt > Private(FP), Public(FP), NP Public(FP) > Private(FP), NP
Infertility treatment coverage (other than in-vitro fertilization)	30%	27%	40%	26%	29%	
Bariatric coverage for weight loss	29%	26%	32%	26%	45%	Govt > Private(FP), NP
Acupuncture/acupressure medical coverage	28%	29%	29%	22%	36%	
Health reimbursement account (HRA)	26%	18%	39%	29%	29%	Public(FP) > Private(FP)
Point of service (POS) plan	26%	25%	35%	26%	23%	
Retiree health care coverage	26%	14%	28%	30%	64%	Govt > Private(FP), Public(FP), NP NP > Private(FP)
In-vitro fertilization coverage	23%	20%	33%	22%	25%	
Hospital indemnity insurance	23%	22%	23%	19%	29%	
Laser-based vision correction coverage	19%	18%	25%	16%	16%	
Pharmacy management program	18%	16%	23%	20%	13%	
Wholesale generic drug program for injectable drugs	17%	15%	19%	20%	20%	
Alternative/complementary medical coverage	16%	16%	13%	15%	20%	
Employer-matched contributions to a health saving account (HSA)	15%	15%	18%	12%	16%	
Grief recovery program	15%	15%	14%	15%	18%	
Consumer-directed health care plan (CDHP)	12%	11%	24%	7%	7%	Public(FP) > NP, Govt
Support groups	12%	11%	15%	17%	11%	
Exclusive provider organization (EPO) plan	8%	8%	11%	3%	11%	
Indemnity plan (fee-for-service)	7%	6%	7%	5%	5%	
Elective procedures coverage (other than laser-based vision correction coverage)	5%	5%	5%	5%	7%	
Experimental/elective drug coverage	3%	3%	3%	5%	4%	
Subsidized cost of elder care	3%	3%	5%	2%	4%	
Gender reassignment surgery coverage	1%	1%	3%	0%	4%	

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table B-3 Preventive Health and Wellness Benefits (by Organization Staff Size)

	Overall	Small (1–99 Employees)	Medium (100–499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Wellness resources and information	72%	60%	72%	82%	Large > medium, small Medium > small
On-site vaccinations	64%	39%	68%	84%	Large > medium, small Medium > small
Wellness programs	59%	46%	58%	73%	Large > medium, small Medium > small
CPR/first aid training	53%	31%	64%	55%	Large, medium > small
24-hour nurse line	50%	44%	51%	53%	
Health fairs	44%	19%	45%	68%	Large > medium, small Medium > small
Wellness newsletter/column	41%	27%	43%	52%	Large > small
Smoking cessation program	39%	26%	39%	51%	Large > medium, small
Health screening programs	38%	19%	39%	54%	Large > medium, small Medium > small
Fitness center membership subsidy/reimbursement	35%	33%	35%	39%	
Health and lifestyle coaching	33%	24%	32%	43%	Large > medium, small
Preventive programs specifically targeting employees with chronic health conditions	30%	20%	31%	38%	Large > small
Weight loss program	30%	21%	29%	40%	Large > small
Rewards or bonuses for achieving or completing certain health and wellness goals/programs	23%	14%	23%	30%	Large > small
On-site fitness center	21%	9%	21%	34%	Large > medium, small
Nutritional counseling	19%	13%	18%	28%	Large > medium, small
On-site blood pressure machine	18%	11%	17%	26%	Large > small
On-site fitness classes	12%	2%	11%	26%	Large > medium, small
Massage therapy services at work	12%	9%	7%	22%	Large > medium, small
Stress-reduction program	11%	5%	11%	18%	Large > small
Health care premium discount for getting annual health risk assessment	10%	4%	9%	14%	Large > small
Health care premium discount for not using tobacco products	8%	5%	8%	11%	
Health care premium discount for participating in a wellness program	8%	4%	5%	13%	
On-site sick room	8%	3%	9%	12%	
On-site medical clinic	5%	1%	4%	12%	Large > small
Health care premium discount for participating in a weight loss program	4%	3%	2%	7%	
Fitness equipment subsidy/reimbursement	4%	6%	3%	3%	
On-site nap room	4%	1%	5%	6%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table B-4 Preventive Health and Wellness Benefits (by Organization Sector)

	Overall	Privately Owned For-Profit Organization	Publicly Owned For-Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Wellness resources and information	72%	66%	83%	74%	75%	Public(FP) > Private(FP)
On-site vaccinations	64%	57%	74%	73%	66%	Public(FP), NP > Private(FP)
Wellness programs	59%	52%	68%	64%	64%	Public(FP) > Private(FP)
CPR/first aid training	53%	49%	49%	58%	64%	Govt > Public(FP), Private(FP)
24-hour nurse line	50%	46%	58%	49%	54%	
Health fairs	44%	34%	61%	53%	52%	Public(FP) > Private(FP)
Wellness newsletter/column	41%	38%	46%	40%	52%	
Smoking cessation program	39%	35%	49%	45%	32%	Public(FP) > Govt
Health screening programs	38%	33%	45%	37%	52%	Govt > Private(FP)
Fitness center membership subsidy/reimbursement	35%	32%	41%	41%	30%	
Health and lifestyle coaching	33%	29%	42%	28%	45%	Govt > Private(FP, NP)
Preventive programs specifically targeting employees with chronic health conditions	30%	25%	42%	29%	34%	
Weight loss program	30%	25%	35%	42%	29%	Public(FP) > Private(FP)
Rewards or bonuses for achieving or completing certain health and wellness goals/programs	23%	20%	29%	27%	27%	
On-site fitness center	21%	18%	19%	26%	29%	
Nutritional counseling	19%	17%	18%	23%	29%	
On-site blood pressure machine	18%	15%	16%	28%	23%	
On-site fitness classes	12%	7%	12%	26%	18%	NP > Private(FP)
Massage therapy services at work	12%	10%	18%	14%	7%	
Stress-reduction program	11%	9%	9%	17%	14%	
Health care premium discount for getting annual health risk assessment	10%	9%	16%	5%	5%	
Health care premium discount for not using tobacco products	8%	7%	14%	8%	4%	
Health care premium discount for participating in a wellness program	8%	7%	12%	7%	2%	
On-site sick room	8%	9%	7%	9%	5%	
On-site medical clinic	5%	4%	6%	7%	9%	
Health care premium discount for participating in a weight loss program	4%	3%	5%	2%	5%	
Fitness equipment subsidy/reimbursement	4%	5%	1%	7%	2%	
On-site nap room	4%	2%	7%	5%	5%	

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table C-3 Financial and Compensation Benefits (by Organization Staff Size)

	Overall	Small (1–99 Employees)	Medium (100–499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Payroll deductions	93%	90%	94%	95%	
Life insurance	91%	83%	93%	95%	Large, medium > small
Defined contribution retirement savings plan	90%	87%	92%	90%	
On-site parking	90%	85%	92%	91%	
Employer match for defined contribution retirement savings plan	72%	66%	75%	74%	
Defined contribution plan loans	69%	60%	71%	75%	Large, medium > small
Undergraduate educational assistance	63%	45%	66%	78%	Large > medium, small Medium > small
Business cell phone or handheld device for personal use	62%	59%	62%	67%	
Balanced funds	61%	50%	65%	64%	Large, medium > small
Graduate educational assistance	59%	40%	62%	75%	Large > medium, small Medium > small
Employee referral bonus	52%	42%	57%	55%	Large, medium > small
Automobile allowance for business use of personal vehicles	51%	51%	56%	45%	Medium > large
Incentive bonus plan (executive)	50%	40%	51%	59%	Large, medium > small
Incentive bonus plan (nonexecutive)	45%	40%	44%	53%	Large > small
Target-date retirement funds	39%	36%	42%	41%	
Spot bonus	38%	39%	33%	45%	Large > medium
Individual investment advice	38%	35%	39%	39%	
Employee discounts on company services	38%	35%	38%	41%	
Shift premiums	38%	19%	43%	49%	Large, medium > small
Credit union	36%	26%	35%	45%	Large > medium, small
Automatic enrollment into defined contribution retirement plan	35%	30%	34%	41%	Large > small
Retirement planning services	35%	35%	35%	37%	
Donations for participation in charitable events	32%	30%	35%	30%	
Defined benefit pension plan	29%	23%	26%	40%	Large > medium, small
Employee computer purchase discounts (not a loan)	29%	18%	24%	45%	Large > medium, small
Financial planning services	28%	24%	27%	34%	Large > small
Full flexible benefits plan	28%	14%	29%	39%	Large > medium, small Medium > small
Company-owned car for employee use	27%	26%	30%	24%	
Sign-on bonus (executive)	27%	15%	25%	42%	Large > medium, small Medium > small
Roth 401(k) savings plan	24%	22%	25%	26%	
Accelerated death benefits	23%	14%	20%	34%	Large > medium, small
Sign-on bonus (nonexecutive)	21%	10%	18%	34%	Large > medium, small
Matching charitable contributions	19%	12%	19%	24%	
Loans to employees for emergency/disaster assistance	19%	19%	18%	20%	

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Table C-3 Financial and Compensation Benefits (by Organization Staff Size) (continued from page 53)

Payroll advances	18%	17%	18%	20%	
Scholarships for members of employees' families	17%	10%	21%	22%	
Stock options	16%	10%	15%	21%	Large > small
Accident insurance	16%	11%	17%	16%	
Stock purchase plan	15%	8%	16%	18%	Large > small
Auto insurance program	14%	10%	10%	22%	Large > medium, small
Qualified transportation spending account	13%	9%	13%	18%	
Transit subsidy	13%	8%	12%	18%	Large > small
Financial literacy programs	12%	8%	12%	18%	Large > small
Retention bonus (executive)	11%	7%	11%	16%	
Credit counseling service	10%	6%	8%	16%	Large > small
Low-/no-interest loans to employees for non-emergency situations	10%	11%	8%	12%	
Parking subsidy	10%	8%	7%	16%	
Retention bonus (nonexecutive)	10%	9%	8%	13%	
SERP (supplemental executive retirement plan)	8%	3%	4%	17%	Large > medium, small
On-site check cashing	8%	7%	7%	11%	
Carpooling subsidy	6%	3%	5%	11%	Large > small
Cash balance pension plan	6%	3%	6%	9%	
Formal phased retirement program	6%	5%	4%	10%	
Free or discounted home Internet service	6%	9%	3%	7%	
Free computers to employees for personal use	5%	4%	6%	5%	
Loans for employees to purchase personal computers	5%	5%	4%	5%	
Personal tax services	3%	3%	3%	3%	
Educational loans for members of employees' families	2%	3%	1%	1%	
401(k) debit card	1%	2%	1%	1%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table C-4 Financial and Compensation Benefits (by Organization Sector)

	Overall	Privately Owned For-Profit Organization	Publicly Owned For-Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Payroll deductions	93%	92%	92%	94%	98%	
Life insurance	91%	87%	97%	97%	96%	
Defined contribution retirement savings plan	90%	89%	94%	92%	88%	
On-site parking	90%	89%	93%	91%	91%	
Employer match for defined contribution retirement savings plan	72%	71%	87%	73%	55%	Public(FP) > Private(FP), NP, Govt Private(FP) > NP, Govt
Defined contribution plan loans	69%	66%	77%	67%	75%	
Undergraduate educational assistance	63%	56%	79%	69%	64%	Public(FP) > Private(FP), Govt
Business cell phone or handheld device for personal use	62%	64%	65%	62%	50%	Public(FP) > Govt
Balanced funds	61%	60%	76%	58%	46%	Public(FP) > Private(FP), NP, Govt
Graduate educational assistance	59%	52%	76%	65%	57%	Public(FP) > Private(FP) Govt
Employee referral bonus	52%	59%	66%	41%	18%	Public(FP) > NP, Govt Private(FP) > NP, Govt
Automobile allowance for business use of personal vehicles	51%	55%	45%	40%	57%	Govt > NP
Incentive bonus plan (executive)	50%	55%	73%	33%	14%	Public(FP) > Private(FP), NP, Govt Private(FP) > NP, Govt
Incentive bonus plan (nonexecutive)	45%	51%	65%	26%	13%	Public(FP) > NP, Govt
Target-date retirement funds	39%	39%	48%	38%	29%	Public(FP) > Govt
Spot bonus	38%	39%	54%	24%	27%	Public(FP) > Private(FP), NP, Govt Private(FP) > NP, Govt
Individual investment advice	38%	39%	31%	44%	36%	
Employee discounts on company services	38%	36%	47%	40%	25%	Public(FP) > Govt
Shift premiums	38%	36%	53%	27%	38%	Public(FP) > Private(FP), NP, Govt
Credit union	36%	26%	28%	50%	64%	NP, Govt > Public(FP) > Private(FP)
Automatic enrollment into defined contribution retirement plan	35%	30%	46%	33%	45%	Public(FP) , NP > Private(FP)
Retirement planning services	35%	31%	34%	47%	46%	NP, Govt > Private(FP)
Donations for participation in charitable events	32%	39%	43%	16%	11%	Public(FP), Private(FP) > NP, Govt
Defined benefit pension plan	29%	20%	24%	35%	70%	Govt > Public(FP), Private(FP), NP
Employee computer purchase discounts (not a loan)	29%	23%	49%	24%	23%	Public(FP) > Private(FP), NP, Govt
Financial planning services	28%	30%	28%	23%	29%	
Full flexible benefits plan	28%	25%	35%	24%	36%	

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Table C-4 Financial and Compensation Benefits (by Organization Sector) (continued from page 55)

Company-owned car for employee use	27%	31%	21%	20%	29%	
Sign-on bonus (executive)	27%	29%	48%	10%	11%	Public(FP) > Private(FP), NP, Govt
Roth 401(k) savings plan	24%	26%	36%	13%	14%	Private(FP) > NP, Govt
Accelerated death benefits	23%	23%	22%	21%	20%	Public(FP) > NP, Govt
Sign-on bonus (nonexecutive)	21%	20%	39%	9%	13%	Public(FP) > Private(FP), NP, Govt
Matching charitable contributions	19%	18%	38%	7%	5%	Public(FP) > Private(FP), NP, Govt
Loans to employees for emergency/disaster assistance	19%	21%	17%	20%	7%	
Payroll advances	18%	22%	9%	20%	13%	
Scholarships for members of employees' families	17%	15%	36%	12%	9%	Public(FP) > NP, Govt
Stock options	16%	10%	49%	5%	2%	Public(FP) > Private(FP), NP, Govt
Accident insurance	16%	12%	24%	16%	9%	Public(FP) > Govt
Stock purchase plan	15%	10%	47%	0%	2%	Public(FP) > Private(FP), NP, Govt
Auto insurance program	14%	12%	22%	15%	2%	Public(FP) > Govt
Qualified transportation spending account	13%	11%	23%	13%	5%	
Transit subsidy	13%	10%	9%	19%	21%	
Financial literacy programs	12%	11%	14%	13%	14%	
Retention bonus (executive)	11%	8%	24%	8%	9%	Public(FP) > Govt
Credit counseling service	10%	9%	8%	12%	14%	
Low-/no-interest loans to employees for non-emergency situations	10%	10%	13%	10%	4%	
Parking subsidy	10%	8%	8%	16%	7%	
Retention bonus (nonexecutive)	10%	8%	17%	5%	14%	
SERP (supplemental executive retirement plan)	8%	5%	20%	7%	2%	Public(FP) > Govt
On-site check cashing	8%	6%	13%	10%	7%	
Carpooling subsidy	6%	4%	6%	5%	18%	
Cash balance pension plan	6%	5%	12%	5%	2%	
Formal phased retirement program	6%	4%	5%	9%	11%	
Free or discounted home Internet service	6%	6%	7%	5%	5%	
Free computers to employees for personal use	5%	7%	2%	2%	5%	
Loans for employees to purchase personal computers	5%	5%	8%	5%	0%	
Personal tax services	3%	4%	3%	1%	0%	
Educational loans for members of employees' families	2%	1%	1%	2%	5%	
401(k) debit card	1%	2%	3%	0%	0%	

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table D-3 Paid Leave Benefits (by Organization Staff Size)

	Overall	Small (1–99 Employees)	Medium (100–499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Paid holidays	97%	98%	99%	95%	
Paid bereavement leave	90%	87%	91%	93%	
Paid jury duty	62%	66%	62%	61%	
Paid vacation plan	47%	47%	50%	46%	
Floating holidays	45%	42%	44%	49%	
Paid time off plan	42%	40%	41%	46%	
Paid sick leave plan	39%	39%	38%	41%	
Paid personal day(s)	31%	38%	28%	32%	
Paid family leave	25%	26%	22%	29%	
Paid military leave	24%	20%	20%	35%	Large > medium, small
Family leave above required federal FMLA leave	22%	15%	25%	26%	Large, medium > small
Time bank of vacation leave	20%	15%	20%	27%	Large > small
Family leave above required state FMLA leave	20%	14%	22%	24%	Large > small
Parental leave above federal FMLA leave	17%	11%	16%	23%	Large > small
Time bank of sick leave	16%	13%	15%	22%	
Paid time off for volunteering	15%	12%	15%	19%	
Paid adoption leave	15%	21%	12%	17%	
Parental leave above state FMLA leave	15%	10%	16%	20%	Large > small
Paid paternity leave	15%	19%	13%	16%	
Paid maternity leave	14%	18%	12%	13%	
Unpaid sabbatical program	12%	10%	11%	16%	
Elder care leave above federal FMLA leave	11%	8%	12%	16%	
Elder care leave above state FMLA leave	11%	7%	12%	14%	
Paid day off for employee's birthday	8%	7%	10%	7%	
Vacation purchase plan	8%	8%	6%	11%	
Emergency flexibility	6%	10%	3%	5%	
Paid sabbatical program	5%	2%	4%	10%	
Company-paid group vacations	1%	3%	0%	1%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table D-4 Paid Leave Benefits (by Organization Sector)

	Overall	Privately Owned For-Profit Organization	Publicly Owned For-Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Paid holidays	97%	98%	99%	97%	96%	
Paid bereavement leave	90%	87%	96%	95%	91%	
Paid jury duty	62%	59%	65%	70%	68%	
Paid vacation plan	47%	46%	48%	45%	54%	
Floating holidays	45%	45%	51%	41%	39%	
Paid time off plan	42%	44%	39%	41%	41%	
Paid sick leave plan	39%	35%	39%	42%	54%	
Paid personal day(s)	31%	28%	36%	37%	32%	
Paid family leave	25%	20%	28%	28%	43%	
Paid military leave	24%	19%	40%	10%	43%	
Family leave above required federal FMLA leave	22%	20%	28%	16%	30%	
Time bank of vacation leave	20%	15%	15%	28%	41%	
Family leave above required state FMLA leave	20%	19%	25%	13%	29%	
Parental leave above federal FMLA leave	17%	15%	19%	14%	27%	
Time bank of sick leave	16%	9%	13%	20%	50%	
Paid time off for volunteering	15%	11%	23%	10%	25%	
Paid adoption leave	15%	13%	25%	13%	20%	
Parental leave above state FMLA leave	15%	14%	18%	10%	25%	
Paid paternity leave	15%	12%	22%	14%	20%	
Paid maternity leave	14%	16%	18%	8%	11%	
Unpaid sabbatical program	12%	8%	8%	22%	21%	
Elder care leave above federal FMLA leave	11%	10%	15%	8%	21%	
Elder care leave above state FMLA leave	11%	10%	15%	6%	20%	
Paid day off for employee's birthday	8%	8%	4%	8%	13%	
Vacation purchase plan	8%	10%	8%	6%	7%	
Emergency flexibility	6%	5%	6%	7%	5%	
Paid sabbatical program	5%	2%	6%	7%	16%	
Company-paid group vacations	1%	2%	1%	0%	0%	

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table E-3 Family-Friendly Benefits (by Organization Staff Size)

	Overall	Small (1-99 Employees)	Medium (100-499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Bring child to work in emergency	29%	40%	28%	21%	Small > large, medium
On-site lactation/mother's room	25%	12%	26%	38%	Large > medium, small Medium > small
Domestic partner benefits for same-sex partners (not including health care coverage)	14%	9%	11%	24%	Large > medium, small
Domestic partner benefits for opposite-sex partners (not including health care coverage)	14%	9%	12%	22%	Large > medium, small
529 plan	14%	10%	13%	19%	
Child care referral service	13%	8%	9%	24%	Large > medium, small
Elder care referral service	11%	3%	8%	21%	Large > medium, small
Adoption assistance	10%	2%	9%	21%	Large > medium, small
Access to backup child care services	5%	2%	4%	9%	
Lactation support services	5%	2%	3%	10%	Large > small
On-site vaccinations for infants/children	3%	3%	1%	6%	
Subsidized child care center	3%	0%	4%	6%	
Foster care assistance	2%	1%	2%	3%	
Geriatric counseling	2%	1%	1%	5%	
Nonsubsidized child care center	2%	1%	0%	7%	
Parenting workplace seminars	2%	0%	0%	7%	
Access to backup elder care services	1%	1%	0%	3%	
Consortium child care center	1%	0%	1%	2%	
Elder care assisted living assessments	1%	0%	2%	2%	
Elder care in-home assessments	1%	0%	1%	3%	
On-site elder care fairs	1%	0%	2%	1%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table E-4 Family-Friendly Benefits (by Organization Sector)

	Overall	Privately Owned For-Profit Organization	Publicly Owned For-Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Bring child to work in emergency	29%	32%	14%	40%	25%	NP > Public(FP), Govt
On-site lactation/mother's room	25%	20%	39%	27%	29%	Public(FP) > Private(FP)
Domestic partner benefits for same-sex partners (not including health care coverage)	14%	9%	26%	15%	13%	Public(FP) > Private(FP)
Domestic partner benefits for opposite-sex partners (not including health care coverage)	14%	9%	22%	19%	13%	
529 plan	14%	13%	15%	10%	20%	
Child care referral service	13%	9%	21%	21%	9%	
Elder care referral service	11%	7%	18%	14%	13%	
Adoption assistance	10%	7%	29%	5%	2%	Public(FP) > Private(FP, NP, Govt)
Access to backup child care services	5%	1%	13%	8%	4%	
Lactation support services	5%	2%	8%	10%	5%	
On-site vaccinations for infants/children	3%	3%	1%	6%	2%	
Subsidized child care center	3%	0%	7%	6%	9%	
Foster care assistance	2%	1%	6%	1%	0%	
Geriatric counseling	2%	1%	2%	5%	2%	
Nonsubsidized child care center	2%	1%	4%	2%	5%	
Parenting workplace seminars	2%	0%	6%	3%	2%	
Access to backup elder care services	1%	1%	3%	1%	0%	
Consortium child care center	1%	1%	1%	1%	2%	
Elder care assisted living assessments	1%	1%	3%	2%	0%	
Elder care in-home assessments	1%	1%	2%	2%	2%	
On-site elder care fairs	1%	0%	2%	2%	2%	

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table F-3 Flexible Working Benefits (by Organization Staff Size)

	Overall	Small (1-99 Employees)	Medium (100-499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Casual dress day (one day per week)	59%	53%	59%	66%	Large > small
Flextime	54%	58%	46%	66%	
Telecommuting on an ad-hoc basis	45%	43%	39%	54%	Large > medium, small
Break arrangements	43%	40%	43%	47%	
Mealtime flex	41%	47%	38%	41%	
Compressed workweek	37%	38%	31%	45%	
Casual dress (every day)	36%	43%	34%	32%	Small > large
Telecommuting on a part-time basis	34%	29%	26%	47%	Large > medium, small
Shift flexibility	21%	13%	25%	24%	Large, medium > small
Telecommuting on a full-time basis	19%	17%	13%	31%	Large > small
Job sharing	16%	8%	13%	29%	Large > medium, small
Seasonal scheduling	16%	8%	14%	22%	Large > medium, small
Alternating location arrangements	4%	3%	5%	5%	
Results-only work environment (ROWE)	3%	5%	3%	1%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM

Table F-4 Flexible Working Benefits (by Organization Sector)

	Overall	Privately Owned For-Profit Organization	Publicly Owned For-Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Casual dress day (one day per week)	59%	57%	67%	52%	68%	Public(FP), Govt > NP
Flextime	54%	49%	58%	60%	66%	Govt > Private(FP)
Telecommuting on an ad-hoc basis	45%	44%	51%	37%	48%	
Break arrangements	43%	42%	41%	47%	45%	
Mealtime flex	41%	39%	38%	50%	43%	NP > Govt
Compressed workweek	37%	33%	33%	41%	54%	Govt > Private(FP), Public(FP)
Casual dress (every day)	36%	40%	34%	34%	23%	Private(FP) > Govt
Telecommuting on a part-time basis	34%	30%	38%	27%	46%	Govt > NP
Shift flexibility	21%	17%	20%	30%	25%	
Telecommuting on a full-time basis	19%	18%	28%	16%	18%	
Job sharing	16%	8%	24%	23%	32%	
Seasonal scheduling	16%	10%	17%	14%	32%	
Alternating location arrangements	4%	4%	7%	3%	5%	
Results-only work environment (ROWE)	3%	2%	3%	5%	4%	

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table G-3 Personal Services Benefits (by Organization Staff Size)

	Overall	Small (1-99 Employees)	Medium (100-499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Direct deposit	99%	97%	100%	100%	
Professional development opportunities	91%	88%	93%	91%	
Professional memberships	91%	91%	93%	89%	
Certification/recertification fees	77%	72%	83%	72%	Medium > large, small
Professional license application or renewal fees	73%	70%	76%	72%	
Cross-training to develop skills not directly related to the job	49%	52%	56%	40%	Medium, small > large
Free/discounted uniforms	29%	17%	36%	31%	Large > medium, small
Organization-sponsored sports teams	25%	15%	28%	30%	Large > medium, small
Mentoring program	22%	14%	23%	28%	Large > small
Postal services for employees	22%	15%	25%	26%	Large > medium, small
Food services/subsidized cafeteria	21%	8%	20%	35%	Large > medium, small Medium > small
Legal assistance/services	21%	13%	18%	33%	Large > small
On-site ATMs	20%	11%	13%	42%	Large > medium, small
Executive club memberships	19%	23%	19%	16%	
Travel planning services	16%	9%	17%	20%	Large > small
Career counseling	14%	6%	14%	22%	Large > small
College/school selection/referral	11%	8%	10%	15%	
Dry cleaning services	10%	4%	12%	14%	Large > small
Employer-sponsored personal shopping discounts	8%	6%	7%	11%	
Self-defense training	6%	2%	5%	11%	Large > small
English as a second language (ESL) classes	6%	3%	7%	7%	
Foreign (non-English) language classes	5%	0%	4%	9%	Large > small
Concierge services	3%	1%	3%	5%	
Pet health insurance	3%	2%	2%	7%	
Prepared take-home meals	1%	2%	0%	1%	
On-site haircuts	1%	0%	0%	3%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table G-4 Personal Services Benefits (by Organization Sector)

	Overall	Privately Owned For-Profit Organization	Publicly Owned For-Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Direct deposit	99%	98%	100%	99%	100%	
Professional development opportunities	91%	88%	95%	97%	93%	
Professional memberships	91%	93%	93%	86%	91%	
Certification/recertification fees	77%	79%	82%	69%	70%	
Professional license application or renewal fees	73%	76%	80%	63%	71%	Public(FP)> NP
Cross-training to develop skills not directly related to the job	49%	52%	51%	50%	38%	
Free/discounted uniforms	29%	28%	31%	22%	36%	
Organization-sponsored sports teams	25%	29%	28%	17%	11%	Public(FP)> Govt
Mentoring program	22%	22%	21%	21%	23%	
Postal services for employees	22%	24%	24%	17%	20%	
Food services/subsidized cafeteria	21%	15%	33%	26%	23%	Public(FP)> Private(FP)
Legal assistance/services	21%	16%	39%	16%	20%	
On-site ATMs	20%	13%	35%	22%	29%	Public(FP) > Private(FP), NP Govt > NP
Executive club memberships	19%	25%	21%	12%	4%	Private(FP), Public(FP) > Govt
Travel planning services	16%	15%	33%	9%	4%	Public(FP) > Private(FP), NP, Govt
Career counseling	14%	11%	29%	12%	11%	Public(FP) > Private(FP), NP, Govt
College/school selection/referral	11%	8%	11%	17%	9%	
Dry cleaning services	10%	12%	16%	6%	0%	Public(FP)> Govt
Employer-sponsored personal shopping discounts	8%	7%	18%	3%	7%	
Self-defense training	6%	2%	6%	8%	16%	
English as a second language (ESL) classes	6%	5%	7%	6%	7%	
Foreign (non-English) language classes	5%	3%	5%	8%	7%	
Concierge services	3%	3%	7%	1%	2%	
Pet health insurance	3%	2%	8%	2%	2%	
Prepared take-home meals	1%	0%	1%	2%	0%	
On-site haircuts	1%	0%	3%	0%	4%	

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



	Overall	Small (1–99 Employees)	Medium (100–499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Location visit assistance	36%	25%	37%	45%	Large > medium, small Medium > small
Temporary relocation benefits	35%	17%	36%	49%	Large > medium, small Medium > small
Relocation lump sum payment	30%	16%	36%	36%	Large, medium > small
Cost-of-living differential	15%	6%	12%	25%	Large > medium, small
Spouse relocation assistance	15%	10%	11%	24%	Large > medium, small
Assistance selling previous home	13%	3%	10%	23%	Large > medium, small
Rental assistance	12%	8%	12%	18%	Large > small
Housing counseling	9%	7%	9%	12%	
Home insurance program	7%	3%	5%	12%	
Mortgage assistance	7%	3%	7%	9%	
Down payment assistance	6%	3%	6%	9%	
Reimbursement for financial loss sustained from a home sale	6%	1%	5%	8%	
Renter insurance program	4%	3%	2%	7%	
Mortgage insurance	3%	1%	3%	5%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM

	Overall	Privately Owned For- Profit Organization	Publicly Owned For- Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Location visit assistance	36%	36%	57%	17%	25%	Public(FP) > Private(FP), NP, Govt Private(FP) > Govt
Temporary relocation benefits	35%	34%	59%	16%	23%	Public(FP) > Private(FP), NP, Govt Private(FP) > Govt
Relocation lump sum payment	30%	29%	53%	20%	14%	Public(FP) > NP, Govt Private(FP) > Govt
Cost-of-living differential	15%	13%	20%	9%	14%	
Spouse relocation assistance	15%	13%	34%	6%	2%	Public(FP) > Private(FP), NP, Govt
Assistance selling previous home	13%	11%	28%	2%	4%	Public(FP) > Private(FP), NP, Govt
Rental assistance	12%	13%	16%	7%	11%	
Housing counseling	9%	8%	16%	7%	7%	
Home insurance program	7%	5%	15%	6%	2%	
Mortgage assistance	7%	4%	13%	6%	5%	
Down payment assistance	6%	4%	11%	6%	5%	

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Table H-4 Housing and Relocation Benefits (by Organization Sector) (continued from page 64)

Reimbursement for financial loss sustained from a home sale	6%	5%	11%	0%	0%
Renter insurance program	4%	2%	9%	3%	0%
Mortgage insurance	3%	2%	6%	2%	2%

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM

Table I-3 Business Travel Benefits (by Organization Staff Size)

	Overall	Small (1-99 Employees)	Medium (100-499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Employee keeps frequent flyer miles	68%	69%	66%	69%	
Employee keeps hotel points	68%	69%	65%	70%	
Per diem for meals	65%	63%	65%	68%	
Business laptop for personal use while on travel	63%	63%	63%	66%	
Paid long-distance calls home while on business travel	58%	58%	61%	59%	
Paid Internet access while on travel	54%	59%	51%	53%	
Travel accident insurance	39%	32%	42%	41%	
Car or limo service to/from airport	37%	38%	37%	38%	
Paid dry cleaning while on business travel	15%	12%	17%	16%	
First or business class airfare	12%	11%	14%	13%	
Rental car upgrades	11%	13%	10%	9%	
Paid minibar snacks at hotel	9%	6%	10%	11%	
Additional pay for weekend travel	7%	6%	7%	9%	
Paid pay-per-view movies at hotel	5%	1%	6%	6%	
Paid travel expenses for spouse	5%	3%	5%	7%	
Paid airline club membership	4%	4%	5%	3%	
Paid health club fees while on travel	3%	3%	5%	3%	
Child care expenses while on business travel	2%	1%	1%	1%	
Pet care arrangements while on business travel	1%	1%	0%	0%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table I-4 Business Travel Benefits (by Organization Sector)

	Overall	Privately Owned For-Profit Organization	Publicly Owned For-Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Employee keeps frequent flyer miles	68%	72%	79%	59%	52%	Public(FP) > NP, Govt Private(FP) > Govt
Employee keeps hotel points	68%	71%	77%	58%	57%	Public(FP) > NP, Govt
Per diem for meals	65%	63%	68%	53%	86%	Govt > Private(FP), Public(FP), NP Public(FP) > NP,
Business laptop for personal use while on travel	63%	70%	59%	56%	55%	Private(FP) > Govt
Paid long-distance calls home while on business travel	58%	65%	67%	42%	45%	Private(FP), Public(FP) > NP, Govt
Paid Internet access while on travel	54%	59%	64%	47%	27%	Public(FP) > NP, Govt Private(FP), NP > Govt
Travel accident insurance	39%	39%	62%	28%	18%	
Car or limo service to/from airport	37%	41%	46%	33%	16%	Private(FP), Public(FP) > Govt
Paid dry cleaning while on business travel	15%	19%	19%	6%	4%	Private(FP), Public(FP) > Govt
First or business class airfare	12%	15%	13%	10%	7%	
Rental car upgrades	11%	11%	13%	10%	4%	
Paid minibar snacks at hotel	9%	11%	13%	6%	0%	
Additional pay for weekend travel	7%	8%	11%	2%	7%	
Paid pay-per-view movies at hotel	5%	7%	3%	3%	0%	
Paid travel expenses for spouse	5%	5%	9%	2%	5%	
Paid airline club membership	4%	4%	9%	1%	0%	
Paid health club fees while on travel	3%	4%	4%	5%	0%	
Child care expenses while on business travel	2%	0%	3%	2%	0%	
Pet care arrangements while on business travel	1%	0%	0%	1%	0%	

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM



Table J-3 Other Benefits (by Organization Staff Size)

	Overall	Small (1–99 Employees)	Medium (100–499 Employees)	Large (500 or More Employees)	Differences Based on Staff Size*
Holiday parties	81%	88%	82%	74%	Small > large
Milestone rewards	70%	50%	78%	74%	Large > medium, small
Company picnic	59%	53%	63%	58%	Medium > small
Noncash, companywide performance awards	51%	49%	53%	49%	
Community volunteer programs	42%	33%	45%	45%	Large > medium, small
Discount ticket services	40%	28%	37%	53%	Large > medium, small
Company-purchased tickets	38%	40%	40%	31%	
Take your child to work day	33%	22%	33%	43%	Large > medium, small Medium > small
Pets at work	6%	9%	5%	4%	
Take your parent to work day	1%	1%	1%	0%	
Take your pet to work day	1%	1%	2%	0%	

(n = 500)

* Indicates a significant difference based on staff size. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM

Table J-4: Other Benefits (by Organization Sector)

	Overall	Privately Owned For-Profit Organization	Publicly Owned For-Profit Organization	Nonprofit Organization	Government Sector	Differences Based on Sector*
Holiday parties	81%	85%	81%	83%	64%	Private(FP), Public(FP), NP > Govt
Milestone rewards	70%	68%	82%	67%	57%	Public(FP) > Private(FP), NP, Govt
Company picnic	59%	63%	65%	47%	46%	Private(FP), Public(FP) > NP, Govt
Noncash, companywide performance awards	51%	51%	57%	48%	43%	Private(FP), Public(FP) > NP, Govt
Community volunteer programs	42%	41%	48%	40%	38%	
Discount ticket services	40%	39%	52%	36%	23%	Public(FP) > Govt
Company-purchased tickets	38%	46%	42%	22%	20%	Private(FP), Public(FP) > NP, Govt
Take your child to work day	33%	28%	40%	31%	43%	Govt > Private(FP)
Pets at work	6%	7%	2%	9%	5%	
Take your parent to work day	1%	2%	0%	0%	0%	
Take your pet to work day	1%	1%	0%	1%	2%	

(n = 498)

Privately owned for-profit organization = Private(FP)

Publicly owned for-profit organization = Public(FP)

Nonprofit organization = NP

Government sector = Govt

* Indicates a significant difference by sector. Blank cells in the last column indicate that no statistically significant differences were found.

Source: 2009 Employee Benefits: A Survey Report by SHRM

**Table K: Prevalence of Benefits (in Alphabetical Order)**

24-hour nurse line	50%
401(k) debit card	1%
529 plan	14%
Accelerated death benefits	23%
Access to backup child care services	5%
Access to backup elder care services	1%
Accident insurance	16%
Accidental death and dismemberment insurance (AD&D)	78%
Acupressure/acupuncture medical coverage	28%
Additional pay for weekend travel	7%
Adoption assistance	10%
Alternating location arrangements	4%
Alternative/complementary medical coverage	16%
Assistance selling previous home	13%
Auto insurance program	14%
Automatic enrollment into defined contribution retirement plan	35%
Automobile allowances for business use of personal vehicles	51%
Balanced funds	61%
Bariatric coverage for weight loss	29%
Break arrangements	43%
Bring child to work in emergency	29%
Business cell phone or handheld device for personal use	62%
Business laptop for personal use while on travel	63%
Cancer insurance	33%
Car or limo service to/from airport	37%
Career counseling	14%
Carpooling subsidy	6%
Cash balance pension plan	6%
Casual dress (every day)	36%
Casual dress day (one day per week)	59%
Certification/recertification fees	77%
Child care expenses while on business travel	2%
Child care referral service	13%
Chiropractic coverage	80%
College/school selection/referral	11%
Community volunteer programs	42%
Company picnic	59%
Company-owned car for employee use	27%
Company-paid group vacations	1%

Table K: Prevalence of Benefits (continued)

Company-purchased tickets	38%
Compressed workweek	37%
Concierge services	3%
Consortium child care center	1%
Consumer-directed health care plan (CDHP)	12%
Contraceptive coverage	66%
Cost-of-living differential	15%
CPR/first aid training	53%
Credit counseling service	10%
Credit union	36%
Critical illness insurance	34%
Cross-training to develop skills not directly related to the job	49%
Defined benefit pension plan	29%
Defined contribution plan loans	69%
Defined contribution retirement savings plan	90%
Dental insurance	96%
Dependent care flexible spending account	70%
Direct deposit	99%
Discount ticket services	40%
Domestic partner benefits for opposite-sex partners (not including health care coverage)	14%
Domestic partner benefits for same-sex partners (not including health care coverage)	14%
Domestic partner health care coverage (opposite-sex)	37%
Domestic partner health care coverage (same-sex)	36%
Donations for participation in charitable events	32%
Down payment assistance	6%
Dry cleaning services	10%
Educational loans for members of employees' families	2%
Elder care assisted living assessments	1%
Elder care in-home assessments	1%
Elder care leave above federal FMLA leave	11%
Elder care leave above state FMLA leave	11%
Elder care referral service	11%
Elective procedures coverage (other than laser-based vision correction coverage)	5%
Emergency flexibility	6%
Employee assistance program (EAP)	75%
Employee computer purchase discounts (not a loan)	29%
Employee discounts on company services	38%

**Table K: Prevalence of Benefits (continued)**

Employee keeps frequent flyer miles	68%
Employee keeps hotel points	68%
Employee referral bonus	52%
Employer match for defined contribution retirement savings plan	72%
Employer-matched contributions to a health saving account (HSA)	15%
Employer-sponsored personal shopping discounts	8%
ESL (English as a second language) classes	6%
Exclusive provider organization (EPO) plan	8%
Executive club memberships	19%
Experimental/elective drug coverage	3%
Family leave above required federal FMLA leave	22%
Family leave above required state FMLA leave	20%
Financial literacy programs	12%
Financial planning services	28%
First or business class airfare	12%
Fitness center membership subsidy/reimbursement	35%
Fitness equipment subsidy/reimbursement	4%
Flextime	54%
Floating holidays	45%
Food services/subsidized cafeteria	21%
Foreign language classes	5%
Formal phased retirement program	6%
Foster care assistance	2%
Free computers to employees for personal use	5%
Free or discounted home Internet service	6%
Free/discounted uniforms	29%
Full flexible benefits plan	28%
Gender reassignment surgery coverage	1%
Geriatric counseling	2%
Graduate educational assistance	59%
Grief recovery program	15%
Health and lifestyle coaching	33%
Health care coverage for dependent grandchildren	37%
Health care coverage for foster children	31%
Health care coverage for part-time workers	35%
Health care premium discount for getting annual health risk assessment	10%
Health care premium discount for not using tobacco products	8%
Health care premium discount for participating in a weight loss program	4%
Health care premium discount for participating in a wellness program	8%

Table K: Prevalence of Benefits (continued)

Health care premium flexible spending account	43%
Health fairs	44%
Health reimbursement account (HRA)	26%
Health savings account (HSA)	32%
Health screening programs	38%
HMO (health maintenance organization) plan	35%
Holiday parties	81%
Home insurance program	7%
Hospital indemnity insurance	23%
Housing counseling	9%
Incentive bonus plan (executive)	50%
Incentive bonus plan (nonexecutive)	45%
Indemnity plan (fee-for-service)	7%
Individual investment advice	38%
Infertility treatment coverage (other than in-vitro fertilization)	30%
Intensive care insurance	35%
In-vitro fertilization coverage	23%
Job sharing	16%
Lactation support services	5%
Laser-based vision correction coverage	19%
Legal assistance/services	21%
Life insurance	91%
Life insurance for dependents	58%
Loans for employees to purchase personal computers	5%
Loans to employees for emergency/disaster assistance	19%
Location visit assistance	36%
Long-term care insurance	39%
Long-term disability insurance	77%
Low-/no-interest loans to employees for non-emergency situations	10%
Mail-order prescription program	91%
Massage therapy services at work	12%
Matching charitable contributions	19%
Mealtime flex	41%
Medical flexible spending account	71%
Mental health coverage	80%
Mentoring program	22%
Milestone rewards	70%
Mortgage assistance	7%
Mortgage insurance	3%

**Table K: Prevalence of Benefits (continued)**

On-site nap room	4%
Noncash, companywide performance awards	51%
Nonsubsidized child care center	2%
Nutritional counseling	19%
On-site ATMs	20%
On-site blood pressure machine	18%
On-site check cashing	8%
On-site elder care fairs	1%
On-site fitness center	21%
On-site fitness classes	12%
On-site lactation/mother's room	25%
On-site medical clinic	5%
On-site parking	90%
On-site vaccinations	64%
On-site vaccinations for infants/children	3%
Organization-sponsored sports teams	25%
Paid adoption leave	15%
Paid airline club membership	4%
Paid bereavement leave	90%
Paid day off for employee's birthday	8%
Paid dry cleaning while on business travel	15%
Paid family leave	25%
Paid health club fees while on travel	3%
Paid holidays	97%
Paid Internet access while on travel	54%
Paid jury duty above what is required by law	62%
Paid long-distance calls home while on business travel	58%
Paid maternity leave	14%
Paid military leave	24%
Paid minibar snacks at hotel	9%
Paid paternity leave	15%
Paid pay-per-view movies at hotel	5%
Paid personal day(s)	31%
Paid sabbatical program	5%
Paid sick leave plan	39%
Paid time off for volunteering	15%
Paid time off plan	42%
Paid travel expenses for spouse	5%
Paid vacation plan	47%
Parental leave above federal FMLA leave	17%

Table K: Prevalence of Benefits (continued)

Parental leave above state FMLA leave	15%
Parenting workplace seminars	2%
Parking subsidy	10%
Payroll advances	18%
Payroll deductions	93%
Per diem for meals	65%
Personal tax services	3%
Pet care arrangements while on business travel	1%
Pet health insurance	3%
Pets at work	6%
Pharmacy management program	18%
Point of service (POS) plan	26%
Postal services for employees	22%
Preferred provider organization (PPO) plan	81%
Prepared take-home meals	1%
Prescription drug program coverage	96%
Preventive programs specifically targeting employees with chronic health conditions	30%
Professional development opportunities	91%
Professional license application or renewal fees	73%
Professional memberships	91%
Qualified transportation spending account	13%
Rehabilitation assistance	37%
Reimbursement for financial loss sustained from a home sale	6%
Relocation lump sum payment	30%
Rental assistance	12%
Rental car upgrades	11%
Renter insurance program	4%
Results-only work environment (ROWE)	3%
Retention bonus (executive)	11%
Retention bonus (nonexecutive)	10%
Retiree health care coverage	26%
Retirement planning services	35%
Rewards or bonuses for achieving or completing certain health and wellness goals/programs	23%
Roth 401(k) savings plan	24%
Scholarships for members of employees' families	17%
Seasonal scheduling	16%
Self-defense training	6%
SERP (supplemental executive retirement plan)	8%
Shift flexibility	21%

**Table K: Prevalence of Benefits (continued)**

Shift premiums	38%
Short-term disability insurance	70%
On-site sick room	8%
Sign-on bonus (executive)	27%
Sign-on bonus (nonexecutive)	21%
Smoking cessation program	39%
Spot bonus	38%
Spouse relocation assistance	15%
Stock options	16%
Stock purchase plan	15%
Stress-reduction program	11%
Subsidized child care center	3%
Subsidized cost of elder care	3%
Supplemental accident insurance	40%
Support groups	12%
Surcharges for spousal health care coverage	32%
Take your child to work day	33%
Take your parent to work day	1%
Take your pet to work day	1%
Target-date retirement funds	39%
Telecommuting on a full-time basis	19%
Telecommuting on a part-time basis	34%
Telecommuting on an ad-hoc basis	45%
Temporary relocation benefits	35%
Time bank of sick leave	16%
Time bank of vacation leave	20%
Transit subsidy	13%
Travel accident insurance	39%
Travel planning services	16%
Undergraduate educational assistance	63%
Unpaid sabbatical program	12%
Vacation purchase plan	8%
Vision insurance	76%
Weight loss program	30%
Wellness newsletter/column	41%
Wellness programs	59%
Wellness resources and information	72%
Wholesale generic drug program for injectable drugs	17%

Source: 2009 Employee Benefits: A Survey Report by SHRM



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Endnotes

- ¹ For more information about HR public policy issues SHRM is monitoring, as well as the positions the Society is advocating both in Washington and in state capitals across the country, please visit www.shrm.org/ADVOCACY.
- ² For 2009, gender reassignment surgery coverage was added to the health care and welfare benefits section.
- ³ For 2009, health care premium discount for participating in a weight loss program, on-site medical clinic and sick room were added to the preventive health and wellness benefits section.
- ⁴ Kronos Optimal HealthCompany. (2007). *Health screenings reveal majority of employees are overweight* [News release]. Retrieved April 1, 2009, from www.kronoshealth.com.
- ⁵ U.S. Department of Health and Human Services. (2003). *HHS issues report on the impact of poor health on businesses* [News release]. Retrieved April 1, 2009, from www.hhs.gov/news/press/2003pres/20030916.html.
- ⁶ U.S. Census Bureau. (2004). *Journey to work: 2000*. Retrieved April 1, 2009, from www.census.gov/prod/2004pubs/c2kbr-33.pdf.
- ⁷ Ibid.
- ⁸ Society for Human Resource Management. (2008, September 1). SHRM Poll: What is your organization doing to help employees deal with 2008 gas prices? Retrieved April 1, 2009, from www.shrm.org/surveys/.
- ⁹ HR professionals were asked to indicate that their organizations offer either a paid time off plan or paid vacation plan, paid sick leave plan and/or paid personal leave.
- ¹⁰ The employee must work at a site at which the employer has 50 or more employees within a 75-mile radius.
- ¹¹ Bureau of Labor Statistics. (2008). *Families with own children: Employment status of parents by age of youngest child and family type, 2006-07 annual averages*. Retrieved April 1, 2009, from www.bls.gov/news.release/famee.t04.htm.
- ¹² For more information on backup care, please refer to SHRM's Survey Brief on this topic, *Backup Care: Alternative Child and Family Care Arrangements* (SHRM, 2007).
- ¹³ National Alliance for Caregiving and AARP. (2004). *Caregiving in the U.S.* Retrieved April 1, 2009, from www.caregiving.org/data/04finalreport.pdf.
- ¹⁴ Society for Human Resource Management. (2009, June). *2009 employee job satisfaction: A survey report by SHRM*. Alexandria, VA: Society for Human Resource Management.
- ¹⁵ For 2009, alternating location arrangements, break arrangements, results-only work environment (ROWE) and seasonal scheduling were added to the flexible working benefits section.
- ¹⁶ For 2009, career counseling and on-site haircuts were added to the personal services benefits section.
- ¹⁷ For 2009, reimbursement for financial loss sustained from a home sale, relocation lump sum payment and renter insurance program were added to the housing and relocation benefits section.
- ¹⁸ For 2009, business laptop for personal use while on travel, paid Internet access while on travel and car or limo service to/from airport were added to the business travel benefits section.



¹⁹ For 2009, take your pet to work day was added to the other benefits section.

²⁰ MetLife. (2009). *MetLife study of employee benefits trends*. Retrieved April 1, 2009, from www.caregiving.org/data/04finalreport.pdf.

²¹ This survey instrument is available upon request by contacting the SHRM Survey Program at surveys@shrm.org or by phone at 703-535-6301.



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Project leader: Shawn Fegley, survey research analyst

Project contributors: Evren Esen, manager, SHRM Survey Research Center
Steve Williams, Ph.D., SPHR, director, SHRM Research
Jennifer Schramm, manager, Workplace Trends and Forecasting Program
Laleh Patel, Research intern

External contributors: **SHRM Total Rewards/Compensation and Benefits Special Expertise Panel:**

Teresa A. Bailey
Rajiv Burman CCP, CEBS, CHRP, SPHR
Jennifer C. Loftus CCP, CBP, GRP, SPHR
Timothy McKeown MBA, SPHR
Lane Transou SPHR

Copy editing: Katya Scanlan, copy editor

Design: Kellyn Lombardi, graphic designer

Production: Bonnie Claggett, production traffic coordinator



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