

2011-2012

→ *Creating Healthy Organizations:*  
Promising Practices  
in Kentucky



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# *Creating Healthy Organizations:* Promising Practices in Kentucky

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We would also like to thank the National Institute for Occupational Safety and Health (NIOSH), CVS Caremark and UK HealthCare for their sponsorship of this study. As the publication of this report would not have been possible without the ongoing support by the University of Kentucky Office of the President and Office of the Provost, we would also like to extend our gratitude to the outgoing President Dr. Lee T. Todd, Jr., our incoming President Dr. Eli Capilouto, and Provost Dr. Kumble R. Subbaswamy. In addition, we would like to recognize the support of the University of Kentucky College of Social Work and Dean Dr. James P. Adams.



## Employer Advisory Panel

A panel of employers took the time to review the HealthIntegrated Model for relevancy and clarity and offered their feedback and advice. We would like to thank the members of this panel for their valuable assistance and perspective:

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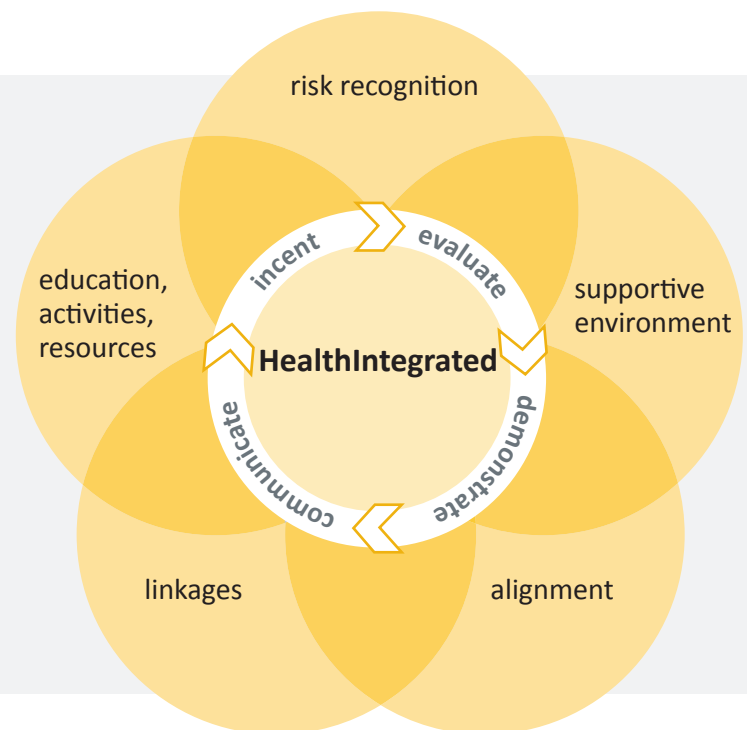
# Executive Summary

Employers today face a host of challenges in resource management as budgets contract, the workforce ages, health care costs mount and chronic disease becomes a chronic concern. Though each of these challenges are significant individually, emerging research reveals many of them to be interlinked with employee health—presenting vast opportunities for innovative problem-solving strategies. One such strategy that has gained attention in recent years is the push for healthy organizations, where employee health and wellness is integrated into the culture, operations, and business strategy of the organization.

Although many employers increasingly understand the opportunities offered by a healthy work environment, many do not know how to begin the transition into actually creating one. In order to address the need for best practice examples and evidence-based tools for developing worksite wellness initiatives expressed by Kentucky employers, the Institute for Workplace Innovation (iwin) presents its *Creating Healthy Organizations: Promising Practices in Kentucky* report. Sponsored in part by the National Institute of Occupational Safety and Health, CVS Caremark, and UK HealthCare, this report provides employers with a process to create healthy organizations (through the HealthIntegrated Model) and case studies that illustrate how Kentucky employers are integrating health and wellness into their culture and business processes.

## Presentation of the HealthIntegrated Model

A HealthIntegrated Organization is an organization that strategically integrates employee health and well-being into its culture and business objectives through collaborative and comprehensive initiatives, policies and practices to achieve positive organizational and employee outcomes. A review of the literature and analysis of employer interviews informed the development of the HealthIntegrated Model, which consists of five key dimensions and four essential business processes. This model provides a tool for integrating health into organizations' culture and operations.



## Presentation of Case Studies

Case studies are presented according to how they represent the five HealthIntegrated Model dimensions. Innovations at a Glance describe how organizations reflect the model's essential business processes for HealthIntegration. An overview of the types of practices gleaned from the case studies are provided below.

### Risk Recognition

Risk recognition is achieved when a firm proactively assesses its health-related risks and target areas at the individual and organizational level and provides information, treatment and follow-up to staff. Health risk assessments (HRAs) and screenings were commonly utilized by employers. By looking at these results—and other sources such as claims data, prescription costs, total health care costs and employee surveys—companies can assess employee risk at the organizational level and stratify their employee population by risk level in order to better target intervention strategies.

*Case studies include the practice of leveraging internal expertise in order to assess organization-level health priorities and provide a rich, data-driven program; and identifying one's most important health issue(s) and providing convenient and frequent screenings to employees.*

### Education, Activities and Resources

The most commonly adopted dimension of a HealthIntegrated Organization is the provision of education, activities and resources in order to empower employees in personal health management. Such programming promotes skill development, behavior change, and awareness-building and is most successful when tailored to employee interests and needs; when families are engaged; and when the physical, psychological, and social aspects of health are recognized. Four categories of programming efforts were reported by participants: the distribution of information via literature or online sources, awareness-building events like health fairs, the provision of classes or interactive group activities, and offering lifestyle (disease case) management programs where participants are stratified by health risk status.

*Case studies include the practice of providing a range of programming to reflect employees' diverse interests and needs; integrating multiple aspects of well-being (e.g., physical, social, emotional, intellectual) in programming efforts; and engaging and empowering workers in managing personal health.*

### Supportive Environment: Physical and Social

As organizations work hard to improve the health of their workers, it is important to consider how the work environment itself may help or hinder employees as they try to adopt healthy behaviors. Supportive environments are those in which leadership has created formal policies that support the cessation of risky behavior and the promotion of healthy behavior; where jobs are designed to reduce physical, psychological, and environmental stressors; and where employees at all levels of the organization are engaged and empowered to support one another in leading healthy lifestyles. Several organizations support health through the physical or social work environment by encouraging coworker support, creating policies that support health, and providing onsite exercise facilities and healthy eating options.

*Case studies include the practice of leadership modeling healthy behavior, using teams and testimonial-sharing to foster coworker support, and providing onsite facilities with policies in place that support their use.*

### Linkages

Linking health-related initiatives with other organizational programs helps to ingrain them into the firm's culture and establish employee well-being as an organizational priority. This is achieved when wellness goals are linked with those of other workforce-related programs. Although strategically integrating goals of linked practices remains a gold standard that is difficult to achieve, many organizations in this study recognized connections between their health and wellness goals and those of their talent management programs, work-life fit initiatives, corporate social responsibility efforts, and their occupational safety and health initiatives.

*Case studies include the practice of connecting wellness activities to work-life initiatives by offering employees flexibility to manage their work and non-work responsibilities (thus reducing stress) as well as to fit exercise into their routine. Also included is the practice of facilitating partnerships between wellness and occupational safety and health initiatives.*

## Alignment

For optimal employee and organizational performance results, emphasis on employee health must be a part of the way that the organization conducts business. In other words, employee health promotion initiatives must be aligned with the organization's strategic business objectives, mission, and values. Often one of the first steps toward aligning employee wellness comes from formally designating staff and resources toward the effort, which many of our participating companies have done. Alignment is aided when wellness staff is well-connected within the organization—across different work groups and within the administrative core.

*Case studies include the practice of creating site certification processes to ensure that health-related goals are infused into an organization's systems and structure, creating standard management objectives that support safety and wellness, offering matching grants to managers to implement localized wellness-focused programming, and aligning wellness goals and programming into a team-oriented management approach.*

## Essential Business Processes for HealthIntegration: Innovations at a Glance

In addition to representing the dimensions of the HealthIntegrated Model through their practices, Kentucky organizations are also implementing its essential business processes for HealthIntegration (incent, evaluate, demonstrate, and communicate). The following practices are highlighted through brief case studies, referred to as "Innovations at a Glance."

- **Incent:** One organization has extended a weight-loss competition (and incentives) for an additional 6-months after its original end-date to reward maintained weight loss.
- **Evaluate:** One company—with a well-established wellness initiative—has innovated numerous ways to evaluate its needs and the effectiveness of its wellness programming by leveraging available resources.
- **Demonstrate:** One organization's founder and owner demonstrates his commitment to employee well-being by participating in exercise competitions with staff, continuously sponsoring community wellness events, and making its exercise facilities a prominent part of the physical work environment.
- **Communicate:** One organization utilizes a variety of communication avenues and engages the labor union to reach its diverse workforce.

## Next Steps

Evidence linking employee health to numerous organizational outcomes—such as employee engagement, organizational commitment, and productivity—continues to build. As the demand for health-oriented organizational strategies continues to grow, iwin is poised to continue its research and employer outreach initiatives in ways that help employers navigate the process of integrating health into their operations and culture.

Copies of *Creating Healthy Organizations: Promising Practices in Kentucky* are available at no charge by contacting UK iwin at **859.257.6767**. An electronic copy is available for download at **[iwin.uky.edu](http://iwin.uky.edu)**.

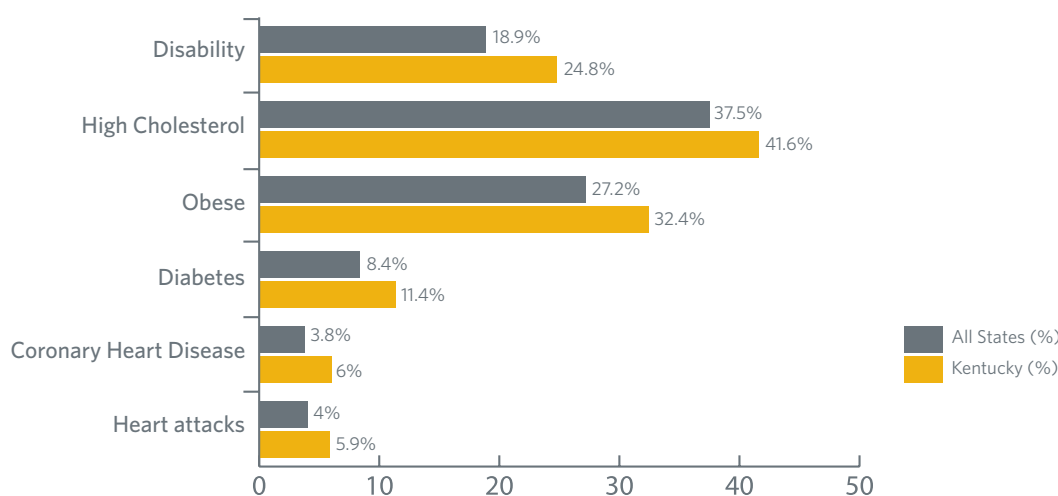
# Background

## Problem: Disease Prevalence in Kentucky

In 2006, 28% of all Americans had two or more chronic conditions and almost half had multiple chronic conditions.<sup>1</sup> In Kentucky, the outlook is even worse. Over two-thirds of Kentuckians are overweight or obese.<sup>2</sup> **In 2009, Kentucky had the 2nd highest prevalence of heart attacks among all states and the 5th highest prevalence of diabetes.**<sup>2</sup>

Kentucky consistently ranks below national averages on key health indicators, in the bottom quartile on an index of seven major chronic diseases (including cancers, diabetes, heart disease, hypertension, stroke, mental disorders and pulmonary conditions),<sup>3</sup> and 49th among all states in Gallup's national index of well-being.<sup>4</sup> Figure 1 presents the prevalence of six chronic diseases in Kentucky and compares them to trends in the United States.

Figure 1. Chronic Disease Prevalence, % Population



## Cost Burden of Chronic Disease on Kentucky Employers

Chronic diseases impose chronic costs. **The cost of health insurance has increased 87% since 2000**, far outpacing both the rate of inflation and wage growth.<sup>5</sup> In 2008, U.S. health care spending was about \$7,681 per resident and accounted for 16.2% of the nation's Gross Domestic Product (GDP), among the highest of all industrialized countries.<sup>6</sup> According to the 2006 Medical Panel Survey, almost 85% of health care spending was attributed to people with chronic conditions.<sup>1</sup> Since the most common and costly chronic diseases—heart disease, stroke, cancer, diabetes, and arthritis—are preventable,<sup>7</sup> high potential exists for workplace wellness programs to successfully avert their development and therefore reduce costs.

## Looking Beyond Health Expenditures: The True Cost of Ill Health

Health care costs pose a significant burden for American organizations and their employees, but the direct medical expenditures are just the beginning. An unhealthy workforce is associated with increased disability and workers' compensation costs, absenteeism, turnover, decreased productivity/presenteeism<sup>8</sup> and disengagement due to stress or mental illness.<sup>3,9</sup> As the workforce ages, chronic disease increasingly hampers its productivity. **It is estimated that only 22% of the economic impact of chronic disease in Kentucky is due to actual health expenses. The vast majority (78%) comes from lost productivity.**<sup>3</sup> For example, in 2003 chronic illnesses cost Kentucky \$21.6 billion. Of that, only \$4.7 billion was attributable to treatment expenditures, whereas \$16.9 billion was due to lost productivity.<sup>3</sup>

Not only are chronic diseases expensive for organizations, but many are also risk factors for other expensive or debilitating conditions. For example, Body Mass Index (BMI) and obesity have been linked with failure to maintain productivity standards<sup>10-12</sup> and obese workers claim two to three times the number of sick days and other absenteeism measures than their non-obese counterparts. In addition, obese workers are up to three times more likely than non-obese workers to develop a disability,<sup>13</sup> and obesity is considered a major risk

factor for type 2 diabetes, coronary heart disease, stroke, several cancers (e.g., endometrial, breast, and colon), hypertension, liver disease, osteoarthritis, gynecological problems and respiratory problems.<sup>14</sup> Each of these carries its own cost burden. Looking at diabetes alone, one study found that workers with diabetes cost 2.3 times what non-diabetics do (\$6,649 per year) and experience productivity losses of 6.6%, or 14 days per year.<sup>15</sup>

## Why Healthy Organizations Matter

### Leveraging Exposure as Opportunity

Chronic diseases are hard to combat. Their causes are manifold, and their remedy requires gradual, systematic change. Despite the need felt by most organizations to improve the health of their workforce, many still struggle. Many forward-thinking companies understand that employee well-being increases organizational value across a number of indicators,<sup>16</sup> a detail that becomes even more meaningful during lean economic times. Not only does employee health impact a number of organizational measures such as productivity, absenteeism, engagement, and workers' compensation expenses; but it is also influenced by a number of factors in the work environment.

Health is more than blood pressure and cholesterol tests. Health is a way of life, which is to say, it is a way of work. The workplace serves as a location where employees spend a great portion of their time, therefore, organizations have tremendous opportunity to influence employee behavior. However, wellness programs whose goals or operations are siloed will find their outcomes limited.<sup>17</sup> **The root influences on employee health are a blending of organizational, structural, community, family, and individual factors. Thus, organizational initiatives that seek to impact employee health and behavior must be multifaceted, interwoven into the culture and the mechanics of an organization, and must also influence employees' behavior in their lives outside of the workplace.**

### Health as Byproduct of Work

Common among organizational health promotion strategies are those that target individual health behavior. However, many of the risk factors that are responsible for the most expensive chronic illnesses—such as diabetes, obesity, and coronary heart disease—are influenced by specific health behaviors such as smoking, poor eating habits, and lack of physical activity.<sup>7</sup> Although influencing individual behavior is incredibly challenging, many of these behaviors, in turn, may be influenced by conditions inherent in the work environment (see Table 1).

**Table 1. Relationships Between Control Over Work & Health Outcomes**

Work Characteristic	Health Outcome
Greater schedule flexibility	Reduced cholesterol <sup>18</sup> Fewer physical symptoms <sup>18,19</sup> Improved self-reported health <sup>20,21</sup> Less health-related impairment at work <sup>22</sup> Improved mental health <sup>23,24</sup> Less stress and burnout <sup>18,20,25,26</sup>
Lack of control over work schedule	Poorer health & well-being <sup>27-29</sup>
Perceived stress	Less likely to quit smoking <sup>30</sup> Decreased likelihood of physical activity <sup>30</sup> Increased drinking <sup>30</sup> Increased risk of obesity <sup>30</sup> Increased risk of diabetes <sup>30</sup>

Occupational health research has documented for over thirty years that certain job characteristics—such as psychological stressors, control over work or schedule, social support, job insecurity, and physical job demands—exert an influence over health outcomes ranging from exhaustion to depression, hypertension, cardiovascular disease, and mortality.<sup>31-33</sup> Specifically, perceived stress is demonstrated to decrease one's likelihood of quitting smoking and of maintaining physical activity while increasing the likelihood of drinking, becoming overweight, and acquiring diabetes.<sup>30</sup> Therefore, employee health behavior—even at home—may have root causes in organizational or structural factors.

In a recent survey looking at worksite wellness program components and goals across the world, stress was listed as the top driver across most organizations globally.<sup>34</sup> In the

United States, however, stress was listed as the sixth most pressing driver. This may indicate that the United States' workforce experiences less stress than other nations, or it could mean that employers are overlooking the connection between the stress that employees experience and their health behaviors. National data surveys by Northwest Mutual Life Insurance (1992), the Families and Work Institute (1997), and the National Opinion Research Center (1989-2002) have suggested that between 26-40% of U.S. workers felt stressed out by their jobs.<sup>35</sup> Post-recession levels are likely much higher as employees are asked to carry higher workloads with less compensation and increasing fear of job loss. In fact, employee engagement and job satisfaction is the lowest it has been in 22 years<sup>36</sup> and according to a recent national survey conducted by the American Psychological Association stress remains a major workplace concern, despite the hope of an economic

## Creating Healthy Organizations in Kentucky

### Study

The prevalence of health and wellness programs in Kentucky organizations has increased dramatically over the past three years, from 34% offering some form of wellness program in 2007 to 63% in 2010.<sup>37</sup> As organizations map out their strategies for integrating health into their culture, they increasingly have expressed the need for case study examples of companies that manage employee health as a strategy to improve the value of their human capital.<sup>38</sup> Therefore, this report responds to a need expressed by employers by publishing case studies of Kentucky organizations—of all sizes and industries—who are creatively addressing issues of employee health and well-being. Specifically, this report aimed to achieve three major objectives: **(1)** utilize scientific literature to develop a comprehensive, healthy organization model that could be used as a guide by employers, **(2)** identify and describe a range of employer initiatives that demonstrate the various ways that employers are promoting health in the workplace, and **(3)** gather information from employers about metrics used to demonstrate the effectiveness of these initiatives.

### Methodology

#### Case Studies

Kentucky-based employers of all sizes and across all industries who have implemented any form of health and wellness initiatives were invited to participate in this research via an email invitation sent to iwin's employer network. Thirty-five employers responded to the email. Employer representatives were asked to provide overall descriptions of their wellness initiatives. If a program reflected uniqueness, depth, and/or innovation, the submitting organization was invited to participate in an in-depth interview. Interviews were completed between June 2010 and January 2011.

Interviews (n=23) collected detailed information from organizational representatives about the wellness initiative's history, goals, logistics, drivers that guided its establishment, data about implementation and sustainability of the practice, employer communication strategies and employee and organizational-level impact. Recommendations, lessons learned, and future trends pertaining to healthy organizational initiatives were also collected. As data was collected, the research team analyzed the findings by pulling and categorizing major themes.

recovery. Findings reveal that 36% of U.S. workers reported regularly feeling stressed due to low wages (49%), lack of opportunities for growth (43%), heavy workload (43%), unrealistic job expectations (40%) and long hours (39%).<sup>39</sup> When work-related stress is not addressed in worksite wellness initiatives, a tremendous opportunity to impact employee health outcomes and organizational performance may be missed.

Because of the extensive influence that employee well-being imposes on so many aspects of organizational performance, it is a business imperative that organizations learn how to manage for health. Work-site wellness programs are increasing in prevalence<sup>37</sup> and evidence reveals that they typically offer a 3 to 1 return on investment in health care cost savings, and much more when considering other organizational outcomes.<sup>8</sup>

**Instead of peripheral health promotion programs that operate in the wings of an organization, we advocate for an integrated approach where employee health is a business objective.**

Despite the growing body of research that has supported the integration of employee health into strategic business objectives,<sup>8,40,41</sup> few organizations actually employ an integrated approach. In fact, in a 2004 review of over 1,500 worksite health promotion programs, only 6.9% of organizations adopted all five components of a “comprehensive” program according to the framework on which our model is based. Both our model and the framework upon which it is based will be described in detail in the HealthIntegrated Model section (page 10).<sup>42</sup>

**Literature Review**

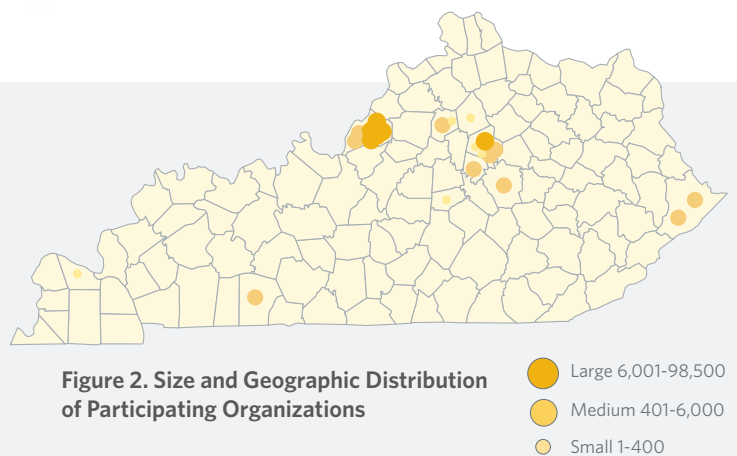
A comprehensive review of the business and health literature was conducted to inform the development of iwin’s HealthIntegrated Model and to provide context for the employer case studies. Information gleaned from this literature review and from analysis of the in-depth interviews guided the creation of the HealthIntegrated Model. This model outlines a comprehensive approach to becoming a healthy organization and is described in detail in Figure 4.

**Advisory Panel**

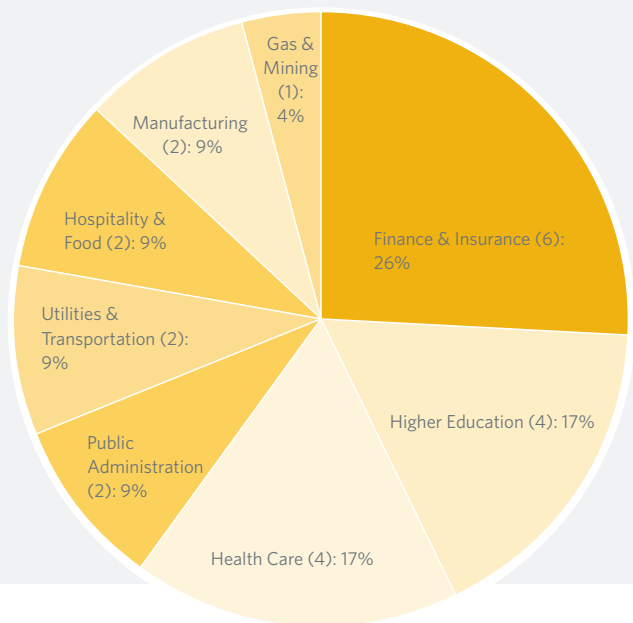
A diverse panel of employer representatives and wellness practitioners provided guidance on the development of the HealthIntegrated Model and on the overall project in order to ensure its relevance to the field of worksite health promotion and to Kentucky employers.

**Participating Organizations**

The 23 employers interviewed for the report represent a diversity of industries, sizes, and geographic regions throughout the state (see Figures 2 and 3). For a detailed list of participating organizations, see page 12.



**Figure 3. Participating Organizations by Industry Sector**



# The HealthIntegrated Model

## HealthIntegrated Dimensions

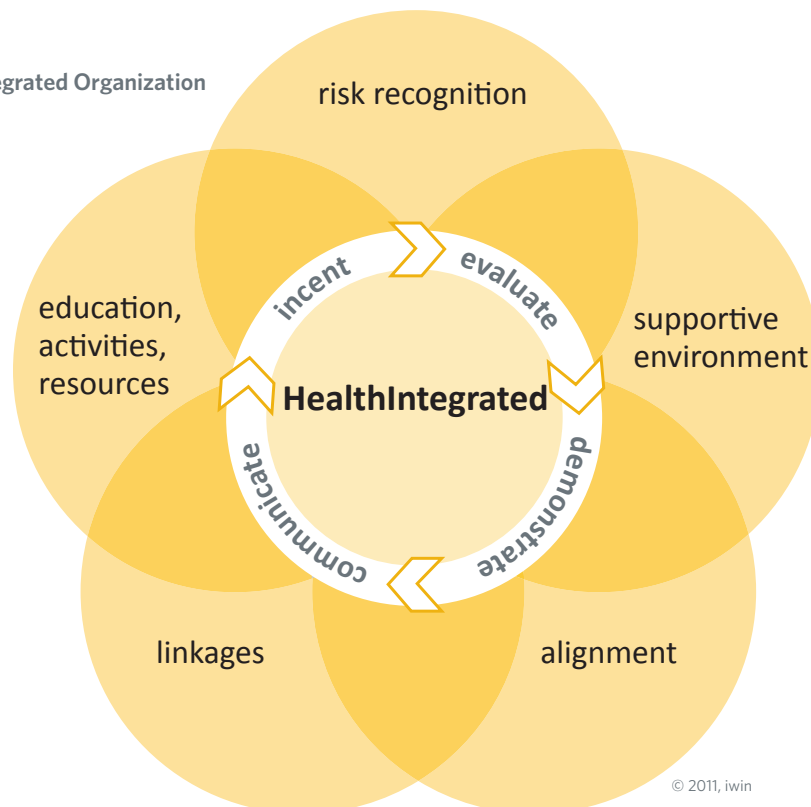
When drafting its *Healthy People 2010* objectives, the Centers for Disease Control and Prevention defined comprehensive health promotion programs as consisting of five elements: **(1)** health education, **(2)** supportive physical and social environment, **(3)** integration of the worksite program into the organization's administrative structure, **(4)** links with related programs, and **(5)** screening programs.<sup>43</sup> Based on our in-depth interviews with organizations, and our review of the business, health and safety, and work organization literature, we found this framework to be an excellent foundation for conceptualizing healthy organizations. However, recent innovations in the work environment prompted us to broaden this framework. The result of this effort, the HealthIntegrated Model, may serve as a guide for organizations interested in integrating health into their operations and culture.

## HealthIntegrated Defined

A HealthIntegrated Organization is an organization that strategically integrates employee health and well-being into its culture and business objectives through collaborative and comprehensive initiatives, policies, and practices to achieve optimal organizational and employee outcomes. As illustrated in Figure 4, iwin's HealthIntegrated Model consists of five key dimensions: Risk Recognition; Education, Activities, and Resources; Linkages; Alignment; and

Resources; Supportive Environment (Physical and Social); Linkages; and Alignment. The model also illustrates the four business processes that are essential to integrating health within any organization: incent, evaluate, demonstrate, and communicate. Dimension and process definitions are provided on the facing page.

Figure 4. HealthIntegrated Organization



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**Risk Recognition**

Health-related risks and target areas are proactively assessed at the individual and organizational level. Convenient screening programs are offered with adequate information, treatment, and follow-up.

**Supportive Environment (Physical & Social)**

Leadership has created formal policies related to cessation of risky behavior and promotion of healthy behavior. Jobs are designed to reduce or eliminate physical, psychological, and environmental stressors. Employees at all levels of the organization are engaged and empowered to support one another in leading healthy lifestyles.

**Alignment**

Employee wellness is integrated into the organizational mission and core business objectives. Funding and staff are allocated with appropriate power and tools to ensure success.

**Linkages**

Wellness goals are linked with other workforce-related programs including occupational safety, corporate social responsibility, employee engagement, talent management, and work-life fit.

**Education, Activities, & Resources**

Employees (and families) are empowered to manage health through skill development, behavior change, and awareness-building opportunities that are tailored to their interests and needs. Physical, psychological, and social aspects of wellness are recognized.

## Essential Business Processes

- **Incent:** Strategic and continual incentives can promote sustained behavior change and help link interim program goals to long-term organizational goals. Incorporating incentives (even small ones) into the strategic business plan can help communicate to employees that the organization cares about their well-being.
- **Evaluate:** As employees are central to an organization's success, their health is inextricably linked to its performance. Data collection across many categories (e.g., productivity, absenteeism, occupational illness/injury, claims data, organizational performance, etc.) demonstrates this connection and can make the business case for health to senior management. Continual process, outcome, and impact evaluations ensure that initiatives meet programmatic and organizational goals to attain maximum impact.
- **Demonstrate:** Leadership commitment to and support of employee well-being is the cornerstone of a health and wellness initiative's success. This support must be clearly displayed through leadership's endorsement of and participation in activities.
- **Communicate:** In order for any initiative to achieve success, communication must be inclusive and constant. Employee input, feedback, and buy-in is crucial, as is communicating results to leadership. By utilizing the channels that are most relevant to staff (whether that is email, social media, company intranet, fliers, or supervisors/managers) and engaging them early, they are more likely to feel ownership of the initiative.

# Organization of the Report

## Case Studies

This report presents case studies based on interviews conducted with Kentucky organizations on their health and wellness initiatives. Each case study is presented as an example of a dimension of the HealthIntegrated Model and provides a brief overview of the organization and its wellness initiative before narrowing its focus to those aspects of the program that reflect the relevant model dimension. Logistical information relevant to managing the initiative is included in order to serve as a guide for other employers interested in implementing similar practices, as are any next steps planned by the organization. Contextual information about the initiative and the organization will be captured in each “Snapshot” box.

### Participating Organizations

The AI J. Schneider Company
Benefit Insurance Marketing
Central Bank and Trust*
Central Baptist Hospital*
City of Paducah
Community Trust Bank*
Eastern Kentucky University
EQT Corporation*
Farmers National Bank
Frankfort Regional Medical Center
GE Appliances & Lighting*
Georgetown College
Kentucky Chamber of Commerce
Kentucky Employers' Mutual Insurance (KEMI)*
LG&E and KU Energy LLC*
Logan Aluminum*
Norton Healthcare, Inc.*
Papa John's International, Inc.*
R. J. Corman Railroad Group*
SHPS, Inc.
University of Louisville*
University of Kentucky*
WellPoint, Inc. (Anthem Blue Cross and Blue Shield)*

\*denotes *iwin* Innovative Employer Roundtable Partner

## Innovations at a Glance: Essential Business Processes

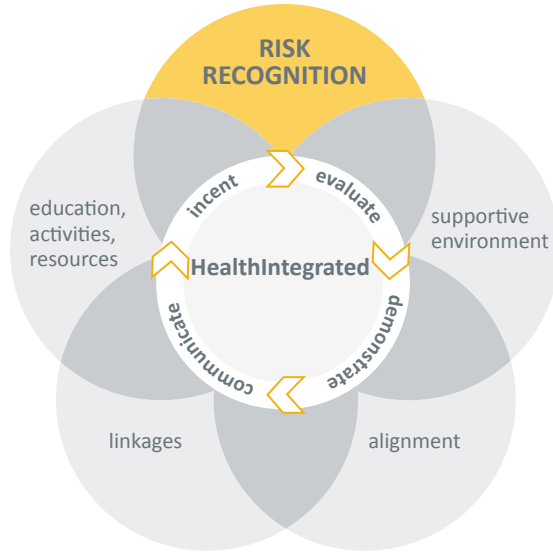
The HealthIntegrated Model includes four business processes essential to integrating health into organizational operations and culture. These processes are illustrated by shorter case studies featuring our participating organizations. These brief case studies are referred to as “Innovations at a Glance.”

### In a Nutshell: Employers' Drivers, Challenges, and Recommendations for Creating Healthy Organizations

Each interview participant was asked about **(1)** the main drivers of his/her organization's wellness program or health-related initiatives, **(2)** the challenges experienced in implementing these initiatives, and **(3)** recommendations to fellow employers interested in initiating a health-related program. Answers to these questions were aggregated and are reported in the “In a Nutshell” charts distributed throughout the report.

### HealthIntegrated Centerfold

The centerfold of the report displays a comprehensive list of the practices adopted by participating organizations as they correspond to the HealthIntegrated Model.



# Risk Recognition

**Health-related risks and target areas are proactively assessed at the individual and organizational level. Convenient screening programs are offered with adequate information, treatment, and follow-up.**

**To get the greatest return on investment, it is important that organizations identify areas that are of greatest risk for its employees and those that take the greatest toll on the bottom line.** Understanding the specific health risks of its employee population allows an organization to understand where to focus interventions or programmatic efforts. Risk can be assessed at various levels. Some companies offer health risk

assessments (HRAs) and biometric screenings to employees so that individuals can understand and manage their health risks. Other organizations go a step further and review HRA and screening results in aggregate form to triage the areas that are most relevant to their population and to set goals and develop programming toward improving these outcomes. With data in hand, these organizations can allocate resources strategically.<sup>40</sup>

**Featured companies (in alphabetical order):  
Eastern Kentucky University • University of Louisville**

# Eastern Kentucky University

## Creative Risk Reduction Program

Through *Healthy You! at EKU*, the university identified high blood pressure as a health risk for its employees and worked within budget constraints to provide necessary screenings.

### Company Overview

Eastern Kentucky University (EKU) is a public teaching and research university with an annual enrollment of over 16,000 undergraduate and graduate students. ECU's main campus is located in Richmond, Kentucky and five satellite campuses are located throughout Southeastern Kentucky. ECU is comprised of five colleges (Arts and Sciences, Business and Technology, Health Sciences, Education, Justice and Safety) as well as the Graduate School and offers 168 degree programs. ECU employs over 3,000 full-time and part-time faculty and staff.

### Initiative Overview

EKU started its wellness initiative, *Healthy You! at EKU (Healthy You!)*, in January 2006 with two goals: **(1)** to improve the health status of its employees and **(2)** to contain health care costs. Through *Healthy You!* employees are provided with a variety of online resources, events, and a health library on campus. All employees have access to *Healthy You!* and employees with benefits can earn incentives for their participation. Employees receive points for participating in different activities such as health fairs and challenges. In 2010 employees had the opportunity to earn up to \$200 by reaching the highest level of engagement. Wellness Analyst Leanna Bowles describes the diverse options available, "We try to plan a wide range of events and provide a lot of different activities that employees can participate in to encourage different levels of engagement."

Within the greater wellness initiative, high blood pressure was identified as a major risk for the employee population. Working creatively within budget constraints, ECU provides blood pressure screenings, support for reducing high blood pressure, and support for increasing overall wellness.

### Implementation

#### Blood Pressure Screenings

Through ECU's health risk assessment, biometric screening, and health care utilization data, high blood pressure was identified as a risk for employees. To combat this health risk, ECU set out to purchase blood pressure kiosks for various campus locations. However because of budget restrictions, the purchase never happened. Alternatively, the university created another option where Bowles and a colleague performed weekly blood pressure screenings at different buildings across campus using a portable blood pressure monitor. Bowles talks about working within a budget, "It doesn't mean we can't do it. It just means we have to find another way to do it. You can do something, even with no money."

Therefore, for an hour each Wednesday blood pressure screenings are available for any ECU employee. Screenings rotate among six to eight buildings throughout the semester. Locations are announced in ECU Today, a daily email sent to all employees. Because of the convenience, employees can easily participate and even earn wellness incentives points. After the screening is performed, employees receive cards with their results. In 2010, almost 300 employees participated in the blood pressure screening on campus.

Bowles believes that the current blood pressure screening process provides accountability and visibility that kiosks would not have "The screenings have been a really good experience to get out there among the people and become part of the culture." Doing the screenings in-person provides teachable moments that would not have been possible with a kiosk.

## Snapshot

**Industry:** Higher Education

**Number of Employees:** 3,000

**Self-Insured:** Yes

**Age of Program:** 5 years

**Headquarters:** Richmond, Kentucky

### Results

EKU measures the success of overall wellness initiative by looking at participation rates. In the 2010 program year, the program participation rates were as follows:

- **47%** of employees participated in at least one activity online
- **45%** of employees completed the online wellness assessment (EKU's goal was 40%)
- **35%** of employees complete a biometric screening
- **35%** of employees earned at least \$150 as an incentive by meeting the minimum qualifications

### Next Steps

By thinking creatively about how to provide needed services, EKU has demonstrated that wellness related activities and services need not be cost prohibitive. EKU is committed to continuing to meet wellness goals and to creatively seeking solutions and using available resources to expand risk recognition and reduction for employees.

**“You can do something, even with no money.”**

# University of Louisville (UofL)

## Targeted Interventions Reduce Risk for Employees and the University

*Get Healthy Now* is a data-driven health management program that utilizes targeted interventions to lessen the primary risk factors of its drivers of cost.

### Company Overview

The University of Louisville (UofL) is a state-supported research university established in 1798. UofL has three campuses: Belknap, the Health Sciences Campus, and ShelbyHurst and is comprised of 12 colleges and schools. Over 2,100 faculty and nearly 4,000 staff help advance the education of 21,000 enrolled undergraduate, graduate, and professional students.

### Initiative Overview

UofL implemented its health management program, *Get Healthy Now*, in 2005 as a means of controlling health care costs. This voluntary, incentive-based program currently provides employees with the opportunity to improve their health through a variety of programs and services that include a health risk assessment and follow-up advising call, onsite wellness coaching, onsite fitness facilities, wellness classes (e.g., smoking cessation, water fitness, etc.), a running club, and many more lifestyle change programs. Seventy percent of UofL's benefit eligible employees are participating in *Get Healthy Now*.

From the start, UofL has used health care claims data to target key priorities of *Get Healthy Now*. From an analysis of its claims data, the university was able to identify the top three lifestyle drivers of health care costs: stress, lack of physical activity, and obesity. The recognition of these drivers has helped the wellness team to develop targeted interventions for employees. Director of *Get Healthy Now* Patricia Benson notes that UofL's internal mantra, "building a sustainable program with measurable impact," helps guide its wellness management program.

### Implementation

The *Get Healthy Now* program allows UofL to create a culture of health and to mitigate employees' health risks by emphasizing healthy behaviors and lifestyles. The comprehensive nature of the program improves employee health and wellness and also decreases the University's health care costs. According to Benson, UofL looks for ways "to improve the overall well-being of the campus community so that the utilization of health care benefits drops and therefore we would see a drop in claims cost." UofL uses its abundant resources (highly knowledgeable faculty and staff) to ensure sustainability and is committed to measuring the impacts of the program.

### Drawing on University Expertise

In developing *Get Healthy Now*, UofL had a unique advantage: a range of expertise to draw from within the university community. In order to utilize its assets, Human Resources (HR) partnered with the College of Education and Human Development (CEHD). By involving faculty, the University was able to gain employee and administrative buy-in from the program's inception while leveraging internal resources. Benson explains, "...sustainability really happens with systematically engaging your efforts with others within that campus or organization who are working towards the same end; then you have a systemic impact. That is what creates sustainability."

### *Get Healthy Now: A Data-Driven Program*

To build a program that is sustainable and has measureable impact, UofL understood data would be critical to its success. As Benson reiterates, "it would be difficult to show our impact" without empirical evidence. UofL has been true to its vision—it has successfully leveraged employee health care claims in several ways to refine *Get Healthy Now* offerings and to demonstrate its impact.

## Snapshot

**Industry:** Higher Education

**Number of Employees:** Approximately 6,500

**Self-Insured:** Yes

**Age of Program:** 7 years

**Headquarters:** Louisville, Kentucky

### Health-Related Awards:

- *Business First's* Greater Louisville's Healthiest Employers (5,000+ employees category) (August 2010)
- Veteran Award, Greater Louisville Inc's Mayor's Healthy Hometown Worksite Wellness Awards (June 2010 & June 2011)
- American Heart Association's Platinum-Level Start! Fit-Friendly Worksite Recognition (2011)

To demonstrate results in the first two years of the program, UofL partnered with a third party vendor to perform a retrospective health care claims analysis. The analysis assessed the impact of ten health risk factors including accidents, high blood pressure, high cholesterol, lack of exercise, prenatal care, oral hygiene, obesity, stress, smoking, and substance abuse. Next, analysis determined how many claims dollars were allocated for each of the health factors, accounting for variation of risk incidents. Through the analysis, UofL's top three drivers of cost were identified—stress, lack of physical activity, and obesity—which provided UofL with an understanding of where it would see the “biggest return on investment.” Using this information coupled with the engaged faculty, UofL was able to develop targeted, coordinated interventions to lessen the primary risk factors of health care claims costs.

One intervention implemented at UofL is the healthy eating initiative. Through the healthy eating initiative, UofL identifies healthy options and encourages individuals to offer them at meetings and work functions. As Benson explains, UofL is not “dictating what foods people are going to eat, but we are ensuring healthy options are available.”

To further refine the *Get Healthy Now* initiative, UofL requested its benefit consultant vendor to expand its health claims analysis to examine if employees with significant, long-term health conditions have a gap in the health care they are receiving. From these analytics, UofL determined that 20-70% of its employees with diabetes were not receiving the recommended preventive care. In order to keep its long-term health plan costs down, UofL launched a disease management program focused on diabetes in 2010. As an incentive, employees now receive all diabetes medications and supplies, heart-related medications, and cholesterol medications at no cost.

Employees participate in a disease management protocol with UofL physicians, receive drug and disease management counseling from a pharmacist, and partner with *Get Healthy Now* staff to promote healthier lifestyles. In its first year, the disease management program had a 98.5% retention rate.

UofL also examined its pharmacy costs and found that depression medication accounted for the highest portion. For this reason, UofL is developing a depression/mental health management program with a tentative 2012 launch date.

“It really is *the employees* who are participating in the program that are actively engaged in either improving or maintaining their overall well-being that are keeping the health care costs down for the entire population.”

# University of Louisville (UofL)

## Results

The university's return on investment analysis has shown that for every dollar invested there is a three-dollar return. Annual health care costs have increased only 2.5% for employees participating in *Get Healthy Now* compared to 19.5% for those not participating. Since 2005, UofL has also been able to achieve its goal of reducing its annual increase in health care costs to below the national trend.

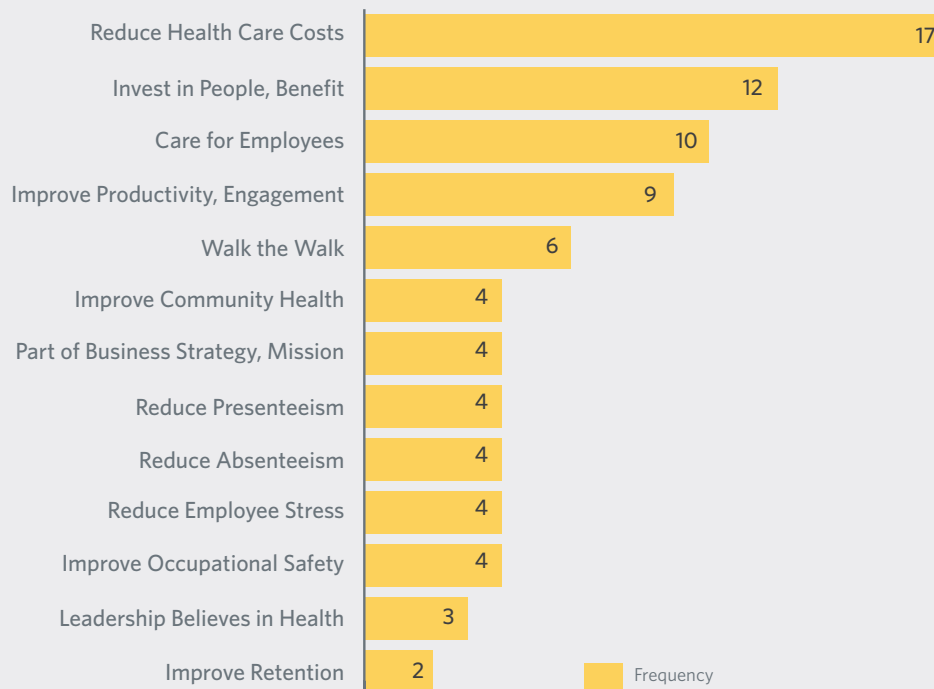
To further evaluate the financial impact of *Get Healthy Now*, UofL focused on three primary areas: **(1)** the per member per year savings of employees who participate in the health risk assessment alone, **(2)** employees participating in the health risk assessment with the follow-up advising call, and **(3)** employees who participated in the health risk assessment, the follow-up health advising call, and also enrolled in the Empowered Health Coaching program. Employees participating in all three activities had an increased savings of approximately \$214. As Benson describes, "It really is the employees that are participating in the program that are actively engaged in either improving or maintaining their overall well-being that are keeping the health care costs down for the entire population."

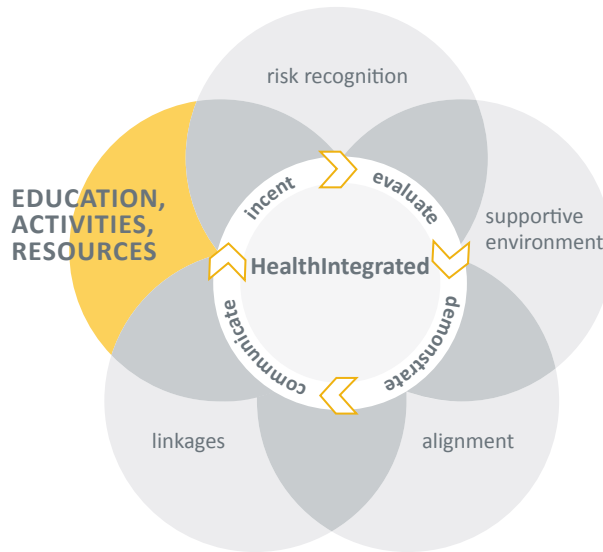
Through the efforts of *Get Healthy Now* and other health-related initiatives, UofL has saved over \$4.0 million for the 2011 health plan year. The Executive Leadership team allocated these savings to salary increases for faculty and staff in 2011-2012.

## Next Steps

By continuing to review empirical data and to engage the faculty in the development of health and wellness programs, UofL is confident that *Get Healthy Now* will continue to provide cost savings to the university as well as to provide many different ways for employees to enhance their own health and wellness. Continued analysis will include looking at the relationship between wellness and workers compensation claims and absenteeism. Moving into the seventh year of the program, UofL will continue to evaluate and to target initiatives that are cost-effective and meaningful to employees. Vice President of Human Resources Sam Connolly explains, "we have demonstrated that the most effective strategy for containing long-term health care costs is to help employees actually live healthier lives by investing in the resources they need to do so."

## In a Nutshell: What's driving Kentucky employers to create healthy organizations?





## ▶ Education, Activities, Resources

**Employees (and families) are empowered to manage health through skill development, behavior change, and awareness-building opportunities that are tailored to their interests and needs.**

**Physical, psychological, and social aspects of wellness are recognized.**

- ▶ **Once risk is assessed, education, activities, and resources can be employed to foster necessary behavior changes.** Such programs are most beneficial when targeting the specific health risks, needs, and wants of the employee population and when they are diverse and inclusive. Involving employees in the development of these activities

offers an avenue for employee engagement and buy-in. In fact, when employees are involved in shaping activities, not only are they more likely to participate in them, but they are also less likely to be absent or to leave the company, and the quality of their work improves.<sup>44</sup>

Featured companies (in alphabetical order):

**Central Bank and Trust • Community Trust Bank**

**Georgetown College • University of Kentucky** ◀

# Central Bank and Trust

## Education is “Central to Wellness”

Central Bank’s *Central Wellness* program includes a comprehensive employee education program that is affordable for the bank, diverse in content, and accessible to all employees. These classes are incentivized in three ways, through wellness credits, prize drawings, and by being offered while employees are on the clock.

### Company Overview

Central Bank is a multi-service financial services company that was founded in 1938. The company has 28 branches throughout Kentucky with headquarters in downtown Lexington. With approximately 525 employees, Central Bank strives to provide customers with the personal attention expected of a community bank.

### Initiative Overview

*Central Wellness*, created in 2007 with the tagline “Healthy in Mind, Body, and Spirit,” takes a comprehensive approach to employee wellness education and activities, offering educational opportunities, biometric screening, healthy options, participation incentives, and behavior change activities — all focused on the mind, body and spirit. In order to increase participation in wellness programs, Central Bank has incentivized activities using wellness points, prize drawings, and technology to ensure that all employees have access to educational classes.

The program is guided by a Wellness Committee that is comprised of bank employees from each market area. Committee members are not officers or managers. The group is meant to be reflective of and accessible to all employees.

Many wellness offerings are available to all full- and part-time employees, even Saturday-only employees. Dependents can take part in wellness activities. However, incentives are for bank employees only.

### Implementation

*Central Wellness*’ tagline, “Mind, Body, and Spirit” was important to the development of the programs offerings that focused on education, physical, and mental health. Executive Vice President and Director of Human Resources, Rose Douglass, explains “We are not just talking about your body here, because some of it is mental and the spirit is very important too.” Education was a key component of the wellness program and the wellness committee is committed to ensuring that employees take advantage of educational offerings. Additionally, the bank realizes that if educational classes are going to be beneficial, they have to be **(1)** affordable for the bank, **(2)** diverse in content, reaching out to employees with different health concerns and needs, **(3)** incentivized, and **(4)** accessible to all employees.

### Affordability

Central Bank is able to leverage community resources to provide a wide array of educational classes, many of which are offered at no cost to the bank. Health experts, non-profit organizations, and educational institutions have offered free classes in the past year. Human Resources Manager Karen Butler describes the generosity of the community, “There is just so much willingness in the community to educate people.” Because of this relationship with the community, Douglass explains that the economy has not negatively impacted the course offerings. “Even though the economy has made us have to reduce our budget, we have still been able to do this.”

### Diverse Content

With an emphasis on the whole person, the wellness committee has worked to ensure that educational opportunities reach out to a wide cross-section of employees. Offered monthly, these educational classes have recently included topics such as gluten sensitivity and gluten-free diets, tips on incorporating exercise into a daily routine, sun care and skin cancer,

## Snapshot

**Industry:** Finance

**Number of Employees:** Approximately 525

**Self-Insured:** No

**Age of Program:** 4 years

**Headquarters:** Lexington, Kentucky

understanding the autism spectrum, heart health, diabetes, elder care and elder law, water conservation, recycling, and eating local/homegrown vegetables. In addition, the bank offers onsite yoga and Zumba classes. Butler emphasizes that the classes focus on “more than just physical wellness. We want to create wellness inside and out.”

### Incentivizing Attendance

Bank employees are required to obtain 12 hours of training credit each year. These training credits comprise five percent of an employee’s performance appraisal. Educational classes offered through the wellness program can count for up to half of those credits. This not only creates an incentive to attend, but it also shows that the bank really believes in the value of wellness. Additional incentives include “wellness points” that can be accrued through participation in many *Central Wellness* programs, including class attendance. One educational class is equal to 50 wellness points — enough to enter the quarterly cash drawing. Each quarter, 25 employees win \$25. Employees are also encouraged to attend classes “on the clock.”

### Accessibility

Because employees are encouraged to attend these monthly classes “on the clock,” Central Bank has worked to make them accessible to all employees. Classes are offered monthly during a 10 a.m. to 12 p.m. timeframe at the downtown Lexington location. Recognizing that not all employees work in Lexington and that not all employees can get away during that timeframe, employees can stream the class live from other locations, and they have the option to view the entire class online at a later time. Central Bank has created an online library of classes that can be viewed by employees at any time. Combining accessibility with incentives helps to maintain high participation levels.

### Results

*Central Wellness* is working. In 2010, Central Bank’s health insurance costs increased just 4%, below the national trend. In addition, Central Bank has seen several success stories from *Central Wellness*. For example, at the biometric screening every year, at least one employee has been diagnosed with a serious or life threatening health problem that was caught. Douglas states, “I think this makes the whole program worth it.” Attendance remains high at educational classes and more and more employees are taking advantage of the online library of classes. Employees challenge one another to make changes based upon what they learn from the courses, and people openly make suggestions for future classes.

### Next Steps

*Central Wellness* will continue to offer a wide variety of educational classes that focus on the mind, body, and spirit. The program will continue to leverage community resources to contain costs and will continue to seek employee feedback to make the classes relevant and engaging. In addition to the current *Central Wellness* offerings, Central Bank is exploring new partnerships for an employee weight-loss program and is looking into ways to make the workplace more conducive to exercise. As Butler explains, “One employee suggested that people would be more likely to take the stairs if we painted the stairwells brightly, so we’re looking into it! Little things add up!”

“We want to create wellness  
inside and out.”

# Community Trust Bank

## Integrated Health and Wellness

Community Trust Bank integrates wellness and employee health by organizing their benefits so that employee health is a part of the overall “wellness benefit” offered by the bank. The bank has worked since 1997 to find creative ways to educate employees and to increase participation in wellness offerings.

### Company Overview

Community Trust Bank, Inc., founded in 1903, is headquartered in Pikeville, Kentucky. The company has 80 banking locations throughout Kentucky, Tennessee, and West Virginia—as well as five trust offices across Kentucky—making it the second largest Kentucky-based bank holding company. Community Trust Bank has 1,058 employees; 982 are located in Kentucky.

### Initiative Overview

Community Trust Bank has a long history of focusing on employee wellness. Community Trust uses a self-funded medical plan and in 1994 began tracking its health care costs. By 1997 there was substantial evidence to support the need for more proactive and preventive health care and the bank realized that it needed to link corporate wellness and health care to ensure employees’ willingness to take part in wellness-related activities. Thus, employee wellness and corporate medical benefits were intergraded to help with cost containment and create a culture of wellness within the organization. Director of Human Resources Howard Blackburn explains: “Eighty percent of our employees are female and, like a number of other companies, we have an aging workforce. Medically speaking, there are some bumps in cost associated with medical coverage for these groups. On top of these, we have regional problems such as high cancer rates and diabetes. If we can create a culture of wellness, integrate health and wellness, we can impact employee health and our own costs.”

Since 1997, Community Trust has focused its efforts on prevention and wellness. The bank’s comprehensive medical plan, the employee assistance program, and all prevention/wellness activities are considered to be part of the wellness offerings for employees. Prevention and wellness activities and offerings include: **(1)** partnering with a local hospital whose staff travels to all Community Trust markets to provide employees with onsite weight and BMI calculations, blood pressure testing, cholesterol check, full panel blood work, pre-screening for diabetes, and a PSA, **(2)** a 24/7 nurse phone line available to all employees enrolled in the benefits plan, **(3)** onsite flu shots, and **(4)** ongoing seminars and educational opportunities related to prevention and enrichment.

Providing these opportunities to employees is not effective unless the services and benefits are utilized. Thus, Community Trust has looked for creative ways to infuse wellness and health promotion into bank activities and to reach out to employees through seminars and educational opportunities. Through these activities, Community Trust works to dovetail wellness with other organizational goals.

**“We want to  
save lives  
and save money.”**

## Snapshot

**Industry:** Finance

**Number of Employees:** 1,058

**Self-Insured:** Yes

**Age of Program:** 14 years

**Headquarters:** Pikeville, Kentucky

### Implementation

Community Trust Bank's goals are twofold according to Blackburn, "we want to save lives and save money!" By integrating health and wellness, the bank aims to contain costs while enriching the lives of employees and their families through affordable and accessible health and wellness benefits. Because employee health and wellness is a high priority for senior management, the human resources department has been charged with creating and maintaining a successful wellness program. Tracking medical costs, focusing on prevention, and continually appraising and revising the educational opportunities ensure that employee knowledge and participation are high.

Recognizing that all employees may not respond to the same opportunities, Blackburn ensures that there are many different ways to disseminate prevention and wellness information. The bank uses regular email blasts, a Mayo Clinic newsletter, and opportunities such as the wildly successful Fashion Show conducted in 2007-2008.

#### *Fashion Show*

In December of 2007, the director of training responded to employee needs by creating a "Business Casual for Women" fashion show at the Ashland, Kentucky bank location. Recognizing this as an opportunity, Community Trust Bank piggybacked wellness onto the event, and a "Dress for Success and Women's Health Issues" event was created. Since women make up 80% of the bank's employees, the fashion show was an excellent avenue for disseminating information about important women's health issues and for explaining what types of care were covered by

employee's health care plan. Concurrent to the fashion show, a local physician presented information related to women's self-care. With many employees in attendance, it gave the company an easy platform for explaining how the wellness initiative could work for its female employees. Employees indicated that this event helped them better understand what preventive care costs were covered by their medical plan, and health care utilization subsequently increased.

Because of the positive feedback about the event—and the increase in health care utilization for prevention—the bank rolled out fashion shows/health care seminars across all regions over a ten-month period. The pairing of personnel training and women's health is one example of how Community Trust Bank works to creatively match wellness with other organizational initiatives.

### Results

Community Trust Bank relies on data to determine the success of its integrated health and wellness program. Data from 1994 to present shows that since the company bundled health and wellness in 1997, they have seen improvements in triglyceride count and HDL ratios and reductions in hypertension, cancer, cardiovascular disease risk, and cholesterol-related problems. People are healthier. While it cannot be empirically measured, Blackburn observes that there has been a shift in the bank's corporate culture. Employees are making healthier choices in their day-to-day activities. Additionally, premium costs have remained flat in the past five years. The bank sees a correlation between utilization of the wellness program's offerings and the overall cost of health care coverage.

### Next Steps

Community Trust Bank plans to continue to capitalize on unique opportunities to link wellness to other bank activities and events. As the bank continues to grow in Kentucky and in the southeastern United States, it will continue to ensure that the culture of wellness that has been established over the last 14 years grows with the business.

# Georgetown College

## A Holistic Approach to Wellness

The *Georgetown College Wellness Program* was developed from a holistic perspective where employees are provided with a variety of options to help enhance their physical, emotional, social, occupational, spiritual, and intellectual well-being.

### Company Overview

Georgetown College is a small Christian, liberal arts college located in Georgetown, Kentucky and was founded in 1787. Through undergraduate and graduate educational programs, the college serves over 1,500 students each year. Georgetown College has 350 faculty and staff employees.

### Initiative Overview

The *Georgetown College Wellness Program* began in 2002 with a holistic perspective: it is focused on improving physical, emotional, social, occupational, spiritual, and intellectual well-being. As Wellness Coordinator Sim Blake explains, “Wellness incorporates much more than getting on a treadmill and exercising. It’s how to deal with daily events.” This philosophy has shaped the offerings provided by Georgetown College as they create opportunities for better health for employees and their families.

Georgetown College’s *Wellness Program* started in 2002 as a collaborative pilot program between Georgetown and its insurance provider. In 2005, the college changed insurance providers and decided to hire a full-time wellness coordinator to manage the program, Sim Blake. Since 2005, the college has worked to ensure that health and wellness programs and opportunities are as diverse as the employees they serve.

### Implementation

In order to focus on physical, social, emotional, occupational, spiritual and intellectual wellness, the *Georgetown College Wellness Program* is made up of three key areas: screenings, activities, and seminars/trainings. As Blake explains, “What we try to do is to think of things that impact people’s lives. It’s just not about eating healthy and exercise. Well a lot of times you’re not eating healthy, you’re not exercising because other aspects in your life are kind of out of whack.”

### Screening

Through the *Wellness Program*, Georgetown College offers a wide range of screenings and assessments that can help employees manage their physical well being. Screening and assessment offerings include annual HRA screening, colon cancer screening, skin cancer screening, a “health snapshot” (which includes total cholesterol, glucose, blood pressure, body composition, body mass index and more), pulmonary function screening, bone density screening, peripheral vascular disease screening, total body flexibility, vision, hearing, and orthopedic screening. Offering a wide range of screenings and preventive health measures allows Georgetown College to reach out to employees who may have many different health concerns.

### Activities

The *Wellness Program* offers many different classes and organized activities aimed at enhancing physical well-being. Organized exercise classes include kickboxing, aerobics, Pilates, strengthening and toning classes, a walking group that meets three times a week, self-defense, and yoga. Additional organized activities have been designed to provide employees with opportunities to enhance spiritual well-being. The “Soul Food” program is an eight-week reading program designed to re-energize your spirit. Several nutrition programs (e.g., H2O, “Waist”-ing Away, and Mama Said: Eat Your Vegetables) have been created to help employees make changes over the course of an eight or ten week program. Online activities such as Round Trip to Health and Route 66 provide opportunities for employees to learn about and log their healthy behaviors.

## Snapshot

**Industry:** Higher Education

**Number of Employees:** 350

**Self-Insured:** No

**Age of Program:** 9 years

**Headquarters:** Georgetown, Kentucky

### Seminars and Training

Georgetown's wellness program provides employees with a wide variety of seminars and trainings that contribute to the adoption or maintenance of a healthy lifestyle. Because the program emphasizes the complex interconnectedness between physical, emotional, social, occupational, spiritual, and intellectual well-being, these offerings are designed to target areas that employees may not initially associate with wellness. Topics for training and seminars have included:

- cholesterol management
- stress management
- conquering workplace negativity
- working with difficult people
- team building/coaching
- dealing with loss
- coping with change in the workplace
- preventing burnout
- financial planning
- nurturing healthy kids and families
- designing healthy meals
- occupational well-being and ergonomics
- smoking cessation
- first aid and CPR
- "Balancing Life's Challenges" (stress management)
- elder care
- sleep disorders
- fun with art

Trainings and seminars come in different shapes and sizes. Some, such as "Balancing Life's Challenges," are three-day seminars whereas others are hour-long sessions. The variety of topics reflects the diverse needs of the College's employees and their families. The program strives to provide something that appeals to and is relevant for everyone. Blake recognizes the importance in "keeping things fresh" and making regular changes to the program. "We don't want to be doing the same thing, so we switch things up every semester."

### Results

The success of the *Georgetown College Wellness Program* is measured by its participation rates. The *Wellness Program* boasts a 70% participation rate among faculty and staff. Reaching out to employees has been easy, and they are excited about the offerings. Blake firmly believes that the high participation rates are due, in part, to the wide variety of ways in which employees and their spouses can take part in wellness activities. Because a majority of Georgetown College's employees are taking part in the wellness program, it has increased awareness for health and wellness on campus.

### Next Steps

"Keeping things fresh" means that the wellness coordinator is always busy planning the next activity, seminar, or screening opportunity. Keeping employees engaged requires ongoing commitment to their needs. Blake hopes to see improved health among employees, which will translate to decreased health care costs for the college. As the campus culture continues to value whole-person wellness, Blake is confident that the program will continue to be well-used and successful.

**"Wellness incorporates much more than getting on a treadmill and exercising. It's how to deal with daily events."**

# University of Kentucky

## Encouraging Medical Self-Care and Prevention

UK's *HealthSmart* initiative is a part of its larger *UK Health and Wellness Program* and assists in lowering health care costs by educating employees on making informed decisions related to health care utilization.

### Company Overview

The University of Kentucky (UK), established in 1865, is the state's flagship land-grant university. UK is a public research university with an annual enrollment of approximately 26,000 undergraduate, graduate, and professional students. Students study in 200 academic programs across 16 colleges and professional schools. The university employs over 13,500 faculty and staff across Kentucky.

### Initiative Overview

The *UK Health and Wellness Program* has evolved from a small wellness program in 1990 to a comprehensive "health management program." Health and Wellness Program Manager Jody Ensman states, "We are trying to manage the health of the population that we are serving." The university's approach to wellness includes four areas: education, awareness, intervention, and incentive programs. The *HealthSmart* initiative is an educational program that emphasizes self-care and informed decision making related to health care utilization. Implementing *HealthSmart* has helped the university to contain costs and to increase employee knowledge about utilization of medical services.

The *UK Health and Wellness Program* serves 22,000 eligible individuals. Employees and retirees are eligible for wellness services and programs, as are their spouses and sponsored dependents. With such a large population to serve, the university works to maximize opportunities for education while also ensuring adequate cost containment and reduction. The *HealthSmart* initiative has helped to meet both of these goals.

### Implementation

Since 1990, UK has continually expanded health and wellness related offerings. Focusing on population health management assists in decreasing health care costs for the university. UK's comprehensive program provides opportunities for employees to engage in a wide variety of programs and services that enhance personal health and wellness. Some of these offerings include an annual wellness conference, wellness classes and activities, preventive screenings at multiple locations, and easy access to fitness facilities. Health and wellness initiatives evolve to meet the needs of program participants. One such evolution is the development of the *HealthSmart* initiative, introduced in 2008 to enhance the educational component of wellness.

### HealthSmart

Ongoing use of health care utilization statistics helped *UK Health and Wellness* to pinpoint the need for more comprehensive consumer education related to health care utilization. Data revealed that emergency department utilization rates were on the rise. Further, the Health and Wellness team learned that some of these visits were unnecessary and could have been avoided if employees and program participants were better educated about when to utilize emergency services, alternatives to visiting the emergency department, self-care, and appropriate treatments related to common ailments. For example, data revealed that the emergency department was being used to provide routine primary care for complaints related to common colds and/or flu-like symptoms. Visiting the emergency department in these situations creates significant out-of-pocket costs for employees as well as hundreds of dollars in health care costs to the university.

## Snapshot

**Industry:** Higher Education

**Number of Employees:** 13,500

**Self-Insured:** Yes

**Age of Program:** 21 years

**Headquarters:** Lexington, Kentucky

### Health-Related Awards:

- American Heart Association's Gold-Level Start! Fit-Friendly Worksite Recognition (2010)
- C. Everett Koop National Health Award Honorable Mention (December 2005)

To educate employees on how to be better health care consumers and how to manage their health at home, *HealthSmart* introduced *Healthier at Home*, a consumer-oriented book written by the American Institute for Preventative Medicine. The book is an informative, easy-to-read, and up-to-date book about common ailments and appropriate treatments or interventions. UK physicians were consulted prior to distribution of the book, ensuring they would be able to incorporate the text's content into their conversation and medical practice. Employees receive the book when they participate in specific health and wellness programs. Online videos and quizzes related to the book's content can be accessed through the university's wellness portal. Additionally, monthly *HealthSmart Conversations* with UK HealthCare experts are linked to topics in the text.

*Healthier at Home* has helped employees make smarter health care decisions by giving them tools to better communicate with health care providers, understand the appropriate care for an ailment, and identify over-the-counter-medications that can be used. For many employees, self-care and education provide a basis for sound decision making. One employee explains, "I tend to avoid doctors, so the book let me know when I should be going (or taking my child), rather than hoping for the best." *Healthier at Home* is designed to create informed consumers who can make good decisions about when and where to seek medical treatment.

## Results

To measure the success of *HealthSmart*, UK surveyed program participants who received the self-care book. Only those participants who had the book for six months or more were surveyed. Of 4,607 recipients, 602 (15%) completed the on-line evaluation. Findings indicate that 69% of respondents had referred to the book and of those:

- **34%** referred to the book five or more times,
- **48%** said it helped them avoid a doctor's visit,
- **25%** said it prevented an emergency department visit.

Additionally, respondents reported that the book helped to decrease absenteeism from work. When asked about its overall effectiveness, 72-87% of respondents agreed that knowledge found within the text helped to improve their quality of care at home, better prepare themselves for a visit to the doctor, and positively affect their health and/or the health of their family. These respondents also indicated that the book was a good source of health care advice, they would recommend it to a friend or family member, and they perceived it as a valuable health care benefit for employees. Open-ended responses yielded the following comments about *Healthier at Home*:

- "It saved my life when I had a heart attack."
- "As a new mother, it has helped me to understand when my baby needs to be seen by a doctor and when a simple over-the-counter medicine will do the job."
- "It helps me to understand certain illnesses and to know the types of across-the-counter medicines to use, or if my symptoms indicate an immediate doctor's visit. It helps me to look for certain symptoms before calling a doctor. I gave one to a friend, who uses it faithfully before calling a doctor. Her husband has some serious issues, and it is a help to her to understand and explain some symptoms."
- "Anytime I have something wrong with me, I refer to the *Healthier at Home* book first to see what I should do."

# University of Kentucky

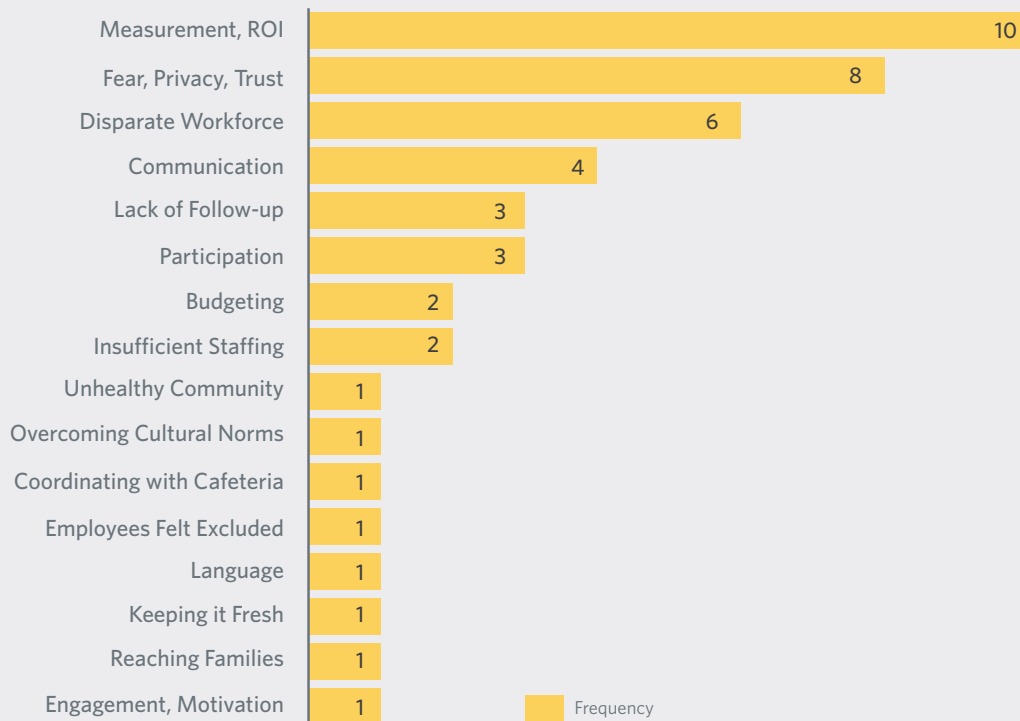
UK has used health care claims data to estimate the average cost of a physician's office visit (\$80) and of an emergency visit (\$800). Based on the statistics and averages above, UK was able to approximate a savings of at least \$116,400 for the university with the distribution of the *Healthier at Home* book and the *HealthSmart* initiative. Ensman reiterates, "If we prevent one person from going unnecessarily to the emergency department that is an \$800 cost savings to the university."

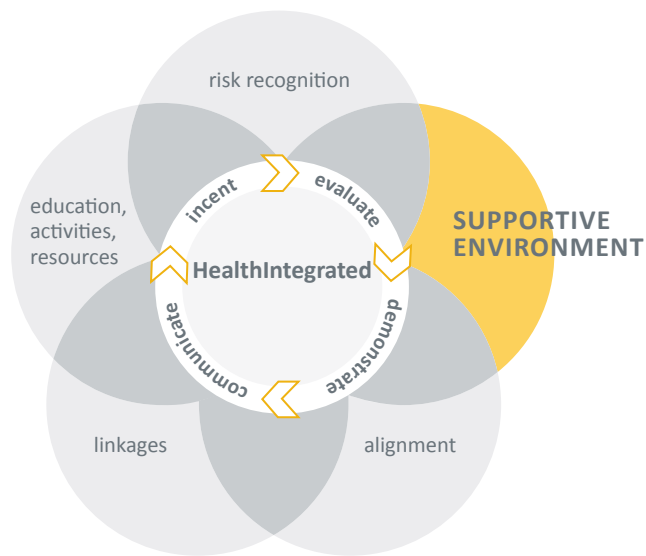
## Next Steps

The University of Kentucky's *Health and Wellness Program* is continually evolving to meet the diverse needs of a large population. The Health and Wellness staff is committed to continued use of the *Healthier at Home* book and will work to engage more employees in the use of this effective self-care and knowledge-building text. The staff will ensure that books continue to be distributed to employees who have yet to receive a copy and that *HealthSmart Conversations* continue to engage employees. Further, the Health and Wellness staff plans to develop a new communication plan to promote the online quizzes and testimonials of those who have benefited from the book. A continued plan is in place to survey those who have had the book for six or more months, allowing for continued evaluation of its efficacy.

**"If we prevent one person from going unnecessarily to the emergency department that is an \$800 costs savings to the university."**

### In a Nutshell: What are employers' challenges to creating a healthy organization?





## ▶ Supportive Environment

Leadership has created formal policies related to cessation of risky behavior and promotion of healthy behavior. Jobs are designed to reduce or eliminate physical, psychological, and environmental stressors. Employees at all levels of the organization are engaged and empowered to support one another in leading healthy lifestyles.

▶ **A supportive environment includes both physical and social dimensions.** Physical dimensions include how the physical environment is structured to enhance safety and promote healthy behavior (e.g., walking paths, onsite fitness centers) while reducing exposure to occupational hazards and opportunities to engage in unhealthy behavior (e.g., smoke-free and healthy food policies, ergonomics training). Social dimensions include ways in which

an organization’s social environment minimizes stress and supports healthy behavior (e.g., leadership modeling, fostering co-worker support). Leadership involvement and buy-in is critical in the establishment of a supportive environment. When leaders model healthy behavior, they can transform a “policy in theory” into a true policy in practice, thus influencing whether an organization meets its health objectives.

Featured companies (in alphabetical order):

***Farmers National Bank*** • ***Kentucky Employers’ Mutual Insurance***

***Norton Healthcare, Inc.*** • ***Papa John’s International, Inc.***

***R. J. Corman Railroad Group*** • ***SHPS, Inc.***

***Wellpoint, Inc. (Anthem Blue Cross and Blue Shield)*** ◀

# Farmers National Bank

## Banking on Wellness

Farmers National Bank has worked to create a social climate that supports and encourages wellness by leveraging resources. Corporate culture embraces wellness activities, challenges and involvement in community wellness events.

### Company Overview

Farmers National Bank is an independent community bank with 11 branch locations in four Central Kentucky counties: Boyle, Garrard, Lincoln, and Mercer. The bank has a rich 131 year tradition of providing excellent service and employs 160 workers. The bank's main office is in Danville (Boyle County).

### Initiative Overview

The *Farmers National Bank Wellness Program* was developed six years ago to provide employees with education and activities to improve their overall health and well-being. The program focuses on risk awareness, education, and behavior change activities. As the program has evolved, the bank's culture has also evolved. Farmers National Bank has a real culture of inclusion and responsibility related to wellness as evidenced by Senior Vice President and Human Resources Manager Amy Isola's explanation of the program, "Yes, a driver is to decrease health care costs, but above all *it is the right thing to do.*" The bank's culture encourages work-life fit, which helps employees find time to participate in wellness activities. Additionally, Farmers merges its wellness program and its commitment to the communities it serves by encouraging participation in local 5K charity events through the *5K My Way* challenge.

Farmers National Bank's wellness initiative is available to all employees. Employees earn up to \$120 yearly in incentives through participation in the health risk assessment and challenges. Employees may apply their wellness benefit to health insurance premiums, dental insurance premiums, flexible spending accounts, health savings accounts, and/or gym memberships.

### Implementation

According to Isola, Farmers National Bank experiences an obstacle common to many industries: "It is such a challenge because we have so many people in so many different locations." Creating inclusive programming that reaches everyone can be difficult. At one point, satisfaction survey data from wellness program participants showed that participation rates were in decline and that branch employees were unable to attend wellness events at the main office. In order to leverage its resources, Farmers began using a few low-cost methods of engaging its workforce in wellness programming. The bank began to focus on **(1)** fostering a culture that supports health, **(2)** utilizing challenges to spur competition within worksites, and **(3)** supporting employee participation in community-based 5k races.

### Supported by Culture

Farmers National Bank has a trusting culture in which employee well-being and work-life fit are supported. Isola explains, "If employees are leery of management or there is a lot of... mistrust, I think it is harder to have a successful program." The trust and support for work-life fit have helped to encourage participation in the wellness initiative. Isola further states, "I think that one reason why the wellness program has had the participation it has had is simply our culture." Participation tracking is done "on the honor system" which further evidences the culture of respect and trust at Farmers.

## Snapshot

**Industry:** Finance

**Number of Employees:** 160

**Self-Insured:** Yes; partially

**Age of Program:** 6 years

**Headquarters:** Danville, Kentucky

### *Quarterly and Monthly Challenges*

Farmers National Bank tries to maintain continual interest in wellness activities through ongoing quarterly and monthly wellness challenges. Fostering competition in the workplace keeps employees engaged in wellness activities and also provides team-building opportunities. Sustaining variety in the challenges offered,—including weight-loss, pedometer, water-intake, getting sufficient sleep, etc.—has helped employees remain interested. Five employees have earned bragging rights for participating in every monthly challenge offered in 2010.

### *Subsidizing Participation in Community-Based Races*

Another way that Farmers extends its wellness activities into all of its branches is by encouraging participation in local 5K races. *5K My Way*, Farmers' quarterly wellness challenge, subsidizes employee participation in 5K races within their communities. In addition to paying half of the registration fee, the bank provides t-shirts and training information to help individuals prepare for the race. At the first such race, 30 employees attended. By creating group training opportunities, the bank meets its goals of enhancing both teamwork and wellness.

### Results

Data collected and evaluated by the bank's third party wellness vendor reveals that health care risks have decreased since the program's inception. In 2011, employees averaged 2.1 health risks (e.g., high blood pressure, obesity, physical inactivity, high stress) compared to 2.7 risks per employee in 2009. In 2010, employees completed 206 challenges, an average of 1.28 challenges per employee. Markers such as these suggest that the program is helping employees make significant positive changes in their health behaviors.

### Next Steps

A wellness program, according to Isola, "is never a finished program." Thus, Farmers National Bank will continually appraise and change its program to ensure high participation and satisfaction rates. Developing new and exciting programs is a priority and in 2011 the bank is working to create a challenge that builds on the *5K My Way* by encouraging employees to participate in races in each of the 4 counties in its service area.

**"Yes, a driver is to decrease health care costs, but above all it is the right thing to do."**

# Kentucky Employers' Mutual Insurance

## Creating Opportunities to Work Together for Wellness

Activities, incentives, and events offered through *beWell@KEMI* foster teamwork in KEMI's employee population both in a work setting and out in the community.

### Company Overview

Kentucky Employers' Mutual Insurance (KEMI) began operation in 1994 and provides workers' compensation insurance for more than 20,000 policyholders in all 120 counties of Kentucky. KEMI is a 200-person company located in Lexington and Louisville.

### Initiative Overview

KEMI's voluntary wellness initiative *beWell@KEMI* has been in place since 2007. The comprehensive wellness program offers employees a wide variety of educational activities such as the health fair and lunch seminars as well as an impressive array of activity-based opportunities to enhance well-being. These include friendly health-related competitions, a Weight Watchers at Work program, family fitness reimbursement, coordinated participation in community run/walk events, and more. Participation in activities is incentivized through the allocation of "wellness points" that can be redeemed for cash and/or gift cards. All KEMI employees are encouraged to participate in the wellness initiative.

### Implementation

*beWell@KEMI* stands out from other corporate wellness programs because it is fully integrated into the social and cultural aspects of the company. Like other KEMI projects, *beWell* is team-driven and is reflective of the personalities of the employees who are vested in its success. Brainstorming for the program was led by employees and fully supported by management. Given that many of KEMI's employees are nurses or have a background in insurance, they intuitively understand why wellness is important both personally and professionally, which has created buy-in from employees at every level. In

addition, because the program has been team-oriented from the beginning, KEMI has been able to capitalize on the inherent motivation fostered by the competition between teams and the support that team members naturally provide each other. Friendly competition between individuals and employee groups and a commitment to walking/running with colleagues underscore the positive social environment that KEMI has created.

### *Friendly Competition at Work*

For three years, KEMI encouraged competition between employee groups. Teams could vie for the coveted position of "top wellness points holder" and would be awarded the team trophy on a quarterly basis. Additionally, bragging rights included photos posted on the company intranet. To earn points, everyone on a team had to complete each wellness activity. For example, every person on the team would have to attend the health fair in order to collect points for that activity. This created accountability between co-workers. Jenny Whitis, KEMI Director of Human Resources, explains, "People are more likely to be involved in something if they're encouraged to do so by someone else involved." After three years of team competition, there was consensus to try something new to ensure that team building and commitment to wellness continued. In 2010 the company rolled out an incentivized running and walking program.

## Snapshot

**Industry:** Insurance

**Number of Employees:** 200

**Self-Insured:** No

**Age of Program:** 4 years

**Headquarters:** Lexington, Kentucky

### Hitting the Roads for a Cause

In place of team competition for wellness points, KEMI reworked its incentive program for participation in community run/walk events and created a new tradition of weekend company walks for employees and their families.

Employees were already earning wellness points for participation in community run/walk events, but these events were further incentivized by awarding bonus points to employees who committed to participating in an event with three or more other KEMI employees. Whitis explains, "This is to encourage groups to get together outside of work and to be active in the community." In addition, KEMI's wellness committee has worked with the activities committee to plan a weekend walk event for employees and their families at a local park. The initial event was so successful that the committee is expanding the event to include a cookout, allowing employees and their families time to focus on healthy lifestyles and to socialize.

Through both of these activities, KEMI creates opportunities for employees to spend time together engaged in wellness activities. These are low-cost opportunities that yield big returns for the company.

### Results

KEMI measures the success of *beWell* by looking at participation rates as well as the results of an anonymous survey sent to employees after each annual health fair. Participation rates are high and survey results suggest that the wellness initiative helps employees to identify health concerns and act upon them. One employee reports having discovered dangerously high blood pressure at the health fair and taking action. Another employee reports that the use of a DermaScan screening led to important preventive care related to skin cancer. Employees engaged in the Weight Watchers at Work program have collectively lost over 1,179 pounds since 2010. Teamwork continues to be the most important aspect of wellness. KEMI sees evidence of this in day-to-day work at the company as employees are empowered by the team culture.

### Next Steps

KEMI's wellness program is reflective of the employees who have shaped and participated in it. Therefore, the company is certain that the initiative will continue to grow and change in response to the needs and desires of as employees and management. One thing is certain: KEMI's employees will maintain their sense of humor and positive attitude towards wellness. In the past, they've had a visit from a manager acting the part of the movie character "Rocky," complete with music and costume, to kick off the wellness campaign. Future events will likely be imbued with that same sense of humor and individuality.

**"People are more likely to be involved in something if they're encouraged to do so by someone else involved."**

# Norton Healthcare, Inc.

## Creating Healthy Health Care Workers

*N Good Health* provides Norton employees with accessibility to easily identifiable healthy food options as well as both indoor and outdoor walking paths.

### Company Overview

Norton Healthcare, Inc. is a not-for-profit health care provider headquartered in Louisville, Kentucky. Norton Healthcare provides quality health care to consumers in the Commonwealth of Kentucky and Southern Indiana. The company is comprised of five large hospitals, 12 immediate care centers, and more than 90 physician practice locations. With 11,400 employees, it is the largest health care system in the Louisville metropolitan area.

### Initiative Overview

Norton Healthcare began creating a comprehensive wellness initiative in 2009 with the formation of its *N Good Health* department. Two employees are dedicated to this initiative and work to encourage employee wellness and healthy living. As Employee Wellness Program Coordinator Allison Ledford explains, "Our leadership realized the critical importance of maintaining a healthy, productive workforce in order to provide high-quality care to the patients we serve." The initiative works to improve the well-being of Norton Healthcare employees by providing them with personal health profiles, physical activity and weight-loss challenges, Lunch 'n Learns, marked indoor and outdoor walking paths, healthy food options, a fitness facility (in Norton Hospital), and a large list of gym facilities that offer Norton employees and their families discounts.

In April 2011, the Center for Prevention and Wellness was formed. The *N Good Health* department is now housed there.

### Implementation

*N Good Health* has two main objectives: to create a culture of wellness where employees feel good about themselves, where they work, and their work-life fit; and to become the healthiest health system in the region. Norton Healthcare hopes to achieve this by **(1)** increasing awareness of health and wellness, **(2)** reducing sickness and injury caused by preventable conditions, and **(3)** working with community partners.

Through surveys, the *N Good Health* department reached out to all employees to understand what they needed out of a wellness initiative. From this information, Norton Healthcare decided to focus on increasing awareness about nutrition and increasing their physical activity. During its first year, the program partnered with the American Heart Association (AHA), and through this partnership AHA approved walking paths, and healthy eating options were created.

### Nutrition

Cafeterias are available in all Norton Healthcare hospitals. The *N Good Health* team focuses on nutrition in these cafeterias. An *N Good Health* combo meal, which is between 450-500 calories, is available every day. In addition, refrigerated shelves are filled with healthy options and are marked with the *N Good Health* logo. The logo provides employees with easily identifiable healthy options, making healthy choices quick and easy for employees.

Norton Healthcare's commitment to nutrition and healthy eating does not end in the cafeteria. Vending machines, usually a haven for fatty snacks, have been targeted for improvement as well. Norton Healthcare established a goal for 10-15% of the food items in the vending machines to be healthy snacks. All

## Snapshot

**Industry:** Health Care

**Number of Employees:** Over 11,400

**Self-Insured:** No

**Age of Program:** 2 years

**Headquarters:** Louisville, Kentucky

**Health-Related Awards:**

- *Business First's* Greater Louisville's Healthiest Employers Finalist (August 2010)
- American Heart Association's Gold-Level Start! Fit-Friendly Worksite Recognition (2009 and 2010)

healthy options in the vending machines will be marked by the company's food vendor with the *N Good Health* logo. This will help employees to make quick, healthy choices.

Norton Healthcare is "trying to really build the culture around getting rid of the unhealthy food and incentivizing our employees to choose healthier options" says Ledford. In addition to creating the healthy options, Norton Healthcare plans to continue to reduce the number of unhealthy options and to reduce the cost of healthier meals and snacks. This will help to make healthy eating more accessible.

### Fitness

To encourage employees to get moving at work, the company leveraged what was already accessible at its hospitals. They mapped out indoor and outdoor walking paths approved by the AHA. Four of the five hospitals have indoor paths and all five have

outdoor paths. Trail maps, available to employees through the *N Good Health* website via Norton's intranet, display a start and finish along with distances along each pathway. Trail length varies based on location.

### Results

In 2009 and 2010, Norton Healthcare focused on building awareness of and interest in the *N Good Health* initiative. Employees are now contributing ideas, participating in weight-loss and fitness challenges, asking health and wellness questions, joining Weight Watchers at Work, and mobilizing to encourage administrative leaders to expand discounted gym membership opportunities for those who may not be able to take advantage of the onsite fitness facilities.

### Next Steps

Norton Healthcare is developing plans to create a comprehensive infrastructure that will provide employees easy access to their health information through an online portal. This will allow employees to access programs tailored to them based on biometric data and responses to health risk assessments.

In 2012, in collaboration with other system departments, *N Good Health* will encourage employees to see a primary care physician, undergo preventive screening, and interact with the *N Good Health* department through the wellness website. Long-term incentives for participation and referrals to disease management and other health promotion activities will be an integral part of the program. Currently, spouses and dependents are invited to attend *N Good Health* events, but Norton Healthcare is also looking to more fully integrate spouses and sponsored dependents into the initiative in future years.

**"Our leadership realized the critical importance of maintaining a healthy, productive workforce in order to provide high-quality care to the patients we serve."**

# Papa John's International, Inc.

## There's No Topping Good Health

Through its *There's No Topping Good Health* campaign, Papa John's uses diversity in programming and opportunities to create a supportive environment — both physical and social — for employee wellness.

### Company Overview

Founded in 1985, Papa John's International, Inc. is a pizza company that strives to deliver its brand promise of "Better Ingredients. Better Pizza." The company, headquartered in Louisville, Kentucky, owns and operates nearly 600 U.S. restaurants and employs 15,000 people. In Kentucky, Papa John's has over 1,500 employees.

### Initiative Overview

In 2008, Papa John's formalized its wellness program by branding it with the *There's No Topping Good Health* logo and tagline. Through this wellness initiative, employees are provided with a variety of easily identifiable wellness programming activities and resources. Papa John's contracts with third party vendors for much of its wellness programming activities, screenings and metrics tracking. Some programs related to the *There's No Topping Good Health* campaign are only offered to team members on Papa John's corporate campus and others are also offered to the managers in the U.S. corporate-owned restaurants. Some programs focus on team members enrolled in the company's health plan, but many (e.g., yoga classes, biometric screenings, Virgin HealthMiles, and the tobacco cessation program) are offered to a broader group of team members.

The support of senior leadership is clearly demonstrated by Founder, Chairman, and CEO John Schattner's enthusiasm for exercise, his personal support of the fitness center provided to team members, and the presence of many wellness-related activities onsite at the corporate headquarters. In addition to the physical support of offering convenient resources for staff, Papa John's believes in offering a diverse array of programs and opportunities to appeal to a broad range of interests and uniting them through the use of the *There's No Topping Good Health* logo. Brenda Miles, Director, Benefits, explains, "At

Papa John's we keep our eye on wellness on an ongoing basis, incorporating new initiatives along the way as we develop the program to uniquely fit our brand. Just as we hold strong to our commitment of 'Better Ingredients. Better Pizza,' it is our intent to help our team members improve personally while strengthening our reputation as a premier, healthy workplace in the community.

### Implementation

#### *Support from Senior Leadership*

*There's No Topping Good Health* was developed and driven by the Benefits Team with support from senior leadership. Founder, Chairman and CEO Schnatter, an avid health enthusiast, has been very supportive of the program and truly leads by example. His support is demonstrated through modeling behavior (e.g., working out at the onsite gym during the day), and the equipment donations he made to the corporate headquarters' onsite gym. Other support comes from the company's community events, such as the Papa John's 10 Miler. According to Miles, "we have been very fortunate to have the leader of our organization committed to support the wellness of our team members."

#### *Program Diversity Supports Inclusivity*

In order to achieve maximum participation in *There's No Topping Good Health* events, Papa John's offers a diversity of programming options. As Miles explains, "Different people are motivated by different things. Not everyone is motivated by yoga, Weight Watchers, or flu shots." In order to achieve this diversity, Miles continues, "It was important to have multiple options to help improve employee health." Such diversity includes the availability of both indoor and outdoor trails, active and passive forms of learning (classes and "lunch 'n learns" vs. library books to check out), regular activities (such as yoga classes) and larger events like the Papa John's 10 Miler.

## Snapshot

**Industry:** Food

**Number of Employees:** Over 15,000

**Self-Insured:** Yes

**Age of Program:** 3.5 years

**Headquarters:** Louisville, Kentucky

Corporate sponsorship of the Papa John's 10 Miler, the third race in the annual Louisville Triple Crown of Running, is highly publicized to the community and is an event in which many team members participate or volunteer. Team members can join "Team Papa" and work with a certified trainer to prepare for the race. They are provided with special shirts/jackets for the race differentiating them from other runners.

### Access and Visibility

In order to further support the adoption of healthy behaviors by its staff, Papa John's employed some business thinking to its wellness program development: marketing and convenience. By developing an easily identifiable wellness logo, the company has been able to enhance the visibility of wellness-related events and opportunities. That way, any time a team member sees the logo, s/he connects the event with health and with the company's support of his or her own healthy behavior.

Likewise, Papa John's wanted to remove obstacles to physical activity and health screenings by bringing its sponsored programs to the worksite. Therefore, many of the organization's wellness resources and activities are located at corporate headquarters including its gym, walking trails, HRAs, mobile mammography units, yoga classes, a health library, "lunch 'n learns," flu shots, and the Health Zone—a computer unit that measures blood pressure, BMI, and weight. Though it still faces challenges in delivering these services to its remote restaurant sites, Papa John's tries to make *There's No Topping Good Health* programs available to managers.

### Results

Papa John's looks at the success of each program offered within the *There's No Topping Good Health* campaign by surveying team members to determine who participated, why they participated, their results. Through these surveys, the *There's No Topping Good Health* team is able to collect testimonials. By analyzing completed surveys, Miles found that many people commented on the convenience of the wellness program and said "if it hadn't been available on campus I wouldn't have done it."

**"At Papa John's we keep our eye on wellness on an ongoing basis, incorporating new initiatives along the way as we develop the program to uniquely fit our brand."**

Participating Organizations' HealthIntegrated Practices	RISK RECOGNITION			EDUCATION, ACTIVITIES	
	Health Risk Assessment	Screenings & Physicals	Defined Organizational Health Risk (aggregate HRA & screenings, claims data)	Literature & Resources (literature, online & intranet, kits)	Awareness Events (health fairs, challenges)
Company					
Al J. Schneider Company	▪	▪		▪	▪
Benefit Insurance Marketing	▪	▪	▪	▪	▪
Central Bank and Trust	▪	▪	▪	▪	▪
Central Baptist Hospital	▪	▪	▪		▪
City of Paducah	▪	▪		▪	▪
Community Trust Bank		▪	▪	▪	▪
Eastern Kentucky University	▪	▪	▪	▪	▪
EQT Corporation	▪	▪		▪	
Farmers National Bank	▪			▪	▪
Frankfort Regional Medical Ctr.	▪	▪	▪	▪	▪
GE Appliances & Lighting	▪	▪		▪	▪
Georgetown College	▪	▪	▪		▪
Kentucky Employers' Mutual Insurance (KEMI)	▪	▪		▪	▪
Kentucky Chamber of Commerce	▪	▪	▪	▪	▪
LG&E and KU Energy LLC	▪	▪	▪	▪	▪
Logan Aluminum	▪	▪		▪	▪
Norton Healthcare, Inc.	▪	▪	▪	▪	▪
Papa John's International, Inc.	▪	▪	▪	▪	▪
R. J. Corman Railroad Group	▪	▪	▪	▪	▪
SHPS, Inc.	▪			▪	▪
University of Louisville	▪	▪	▪	▪	▪
University of Kentucky	▪	▪	▪	▪	▪
WellPoint, Inc. (Anthem Blue Cross and Blue Shield)	▪	▪	▪	▪	▪



LINKAGES				ALIGNMENT		
Work-Life Fit Linked to Wellness <i>(Employee Assistance Program, Eldercare, flexibility)</i>	Occupational Safety Linked to Wellness <i>(injury prevention programs)</i>	Coordination with External Vendors <i>(linking strategic goals of various vendors)</i>	Wellness Linked to Corporate Social Responsibility	Reflected in Mission, Vision, & Values	Performance Reviews or Objectives Tied to Employee Wellness	Full-Time Staff Allocated
■	■		■	■		
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■	■	■		■	■	
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# HealthIntegrated Practice Definitions

## Risk Recognition

**Health Risk Assessment:** an evaluation, usually through a questionnaire, that determines health risk factors (i.e., life style behaviors, health and safety practices, and biometrics) that increase risk for serious or chronic health conditions. Depending on how they are utilized, HRAs help individuals and/or organizations determine their level of risk and helps stratify individuals into necessary programming.

**Screenings & Physicals:** organization provides convenient, routine testing for chronic disease, illness or overall health status.

**Defined Organizational Health Risk:** the organization collects comprehensive data from health risk assessments, claims data (or other analytical tool) to conduct a health-related needs assessment, and then identifies strategic target areas for health and wellness initiatives based on their highest areas of risk.

## Education, Activities, and Resources

**Literature & Resources:** health and wellness resources—such as libraries, brochures, health education kits— are conveniently provided at low or no cost to employees.

**Awareness Events:** events hosted or sponsored by the organization to increase employees' health and wellness knowledge. Examples of such events include health fairs or organizational challenges (e.g. weight-loss, pedometer, walking groups, etc.) and may include employees' family members.

**Healthy Lifestyle Programs:** recurring classes, workshops, and seminars provided by the organization— that address health and well-being. May include classes (e.g., exercise classes, gym membership subsidies, tobacco cessation programs, financial wellness, stress reduction, etc.), provision of flu-shots or opportunities to work directly with a specialist (e.g., access to personal coaching, nutritionists, trainers, counseling, etc.).

**Disease Case Management:** in cases where employees are diagnosed with chronic or life-altering illnesses or conditions that require extensive self-care (e.g., asthma, COPD, diabetes, pregnancy, and coronary artery disease), the organization provides coordinated interventions, resources, and/or educational materials to help employees manage their health.

## Supportive Environment (Physical and Social)

**Encouraging Co-Worker Support:** employee testimonials, success stories, and/or teams are utilized to motivate co-workers, celebrate success and build a supportive culture.

**Wellness Policies:** the organization demonstrates its commitment to health through enforced policies related to health and well-being. Policies may include a tobacco-free environment, healthy eating options for meetings or in cafeterias, or other.

**Physical Environment:** an organization's facility reflects its commitment to the health and well-being of employees. Examples include creating walking trails and scenic paths, appealing hallways and stairwells, or provision of on-site fitness equipment or facility.

**Healthy Options:** healthy eating options are offered to employees through vending machines, cafeteria, meetings, or other food provided to employees by the organization.

## Linkages

**Work-Life Fit Linked to Wellness:** the organization formally links health and wellness to employee work-life programs through shared goal development. Efforts are in place to help employees balance work and personal responsibilities with the understanding that work-life fit improves both performance and health. Employees are offered access to such programs as Employee Assistance Programs and Eldercare.

**Occupational Safety Linked to Wellness:** the organization formally links health and wellness to occupational safety programs through shared goal development. Recognizing that healthy employees tend to have fewer injuries, the organization connects its efforts toward fostering a safe work environment with its efforts toward improving employee health.

**Corporate Social Responsibility Linked to Wellness:** the organization formally links health and wellness to corporate social responsibility programs through shared goal development. Through community outreach programming (e.g., races, community health fairs, philanthropic activities), the organization embraces its responsibility as a steward of community and environmental health.

**Coordination with External Vendors:** the organization links the goals and strategies of various external vendors (e.g., health care providers, insurance firms) to achieve coordinated, strategic goals for health and wellness. Encouraging cooperation among external vendors better ensures that broader organizational goals are met more efficiently.

## Alignment

**Reflected in Mission, Values, Vision:** the organization's mission statement, values, and vision reflects its desire to enhance employee well-being and create a healthy work environment.

**Performance Reviews or Objectives tied to Employee Wellness:** senior leadership demonstrates commitment to employee health by creating health-related performance objectives or approving the allocation of work-time to the promotion of or participation in health and wellness-related activities.

**Full-Time Staff Allocated:** the organization has hired an individual or group of individuals whose sole responsibilities are to create, implement, or support a health and wellness initiatives for the organization.

# R. J. Corman Railroad Group

## Visible & Accessible Wellness Offerings

Through the *R. J. Corman Health & Wellness Program*, the company altered its physical environment to promote healthy lifestyles for its employees specifically through access to resources that support physical activity such as onsite walking/running trails and company bicycles.

### Company Overview

R. J. Corman Railroad Group, founded in 1973, is a full-service supplier to the rail industry. R. J. Corman is comprised of several business entities that provide a full array of services to the rail industry. These include rail construction, derailment services, a dinner train, material sales, storm team, and short line railroad operations.

The company employs over 900 people and has operations in 21 states. Approximately half of the company's employees are in Kentucky.

### Initiative Overview

The *R. J. Corman Health & Wellness Program* began in 2008 and provides employees with events and resources to encourage healthy behaviors as well as to increase their awareness about health and wellness. Among the resources provided to the employees are company bicycles and a marked onsite running/walking trails including an official 5K race course.

In addition, R. J. Corman offers its employees annual screenings, seminars, an employee assistance program, blood pressure machines located throughout the offices, and a healthy lunch in the cafeteria at no cost to the employees. A unique aspect of the company's wellness initiative is that components of the wellness activities and events are available not only to employees, but to their families as well. As Wellness Manager Ashley Howard explains, "If you want an active employee, you want his or her family to be active, too." R. J. Corman uses gift cards and drawings to incentivize health and wellness activities and lifestyle changes. For example, in a recent weight-loss challenge, participants who reached a targeted percentage of weight loss received a gift card and were entered into a drawing to win a Wii Fit.

### Implementation

R. J. Corman's wellness initiative was created after Owner and Founder Richard J. Corman and former Wellness Manager David Cravens found they were both interested in helping to facilitate a healthier and more active lifestyle for employees. In order to do this, they realized the need to make exercise as convenient, comfortable, and entertaining as possible. Creating running/walking trails and making bicycles available onsite met these criteria.

### Walking/Running Trails

R. J. Corman has created marked trails for employees to use and provides them with a 1 hour and 20 minute lunch break so exercise can more easily fit into the workday. The company has created four trails on 198 acres of farmland at the Nicholasville headquarters. Trails range from 1.6 to 3.3 miles each. A stream runs through the farmland, and park benches and coolers are available intermittently along the trails. Each of the coolers is replenished daily with bottled water, allowing employees to stay hydrated. The farmland also houses a newly built pavilion, dedicated to Cravens, where restrooms and shade can be found.

The marked trails make up an official 5K course which R. J. Corman uses to host races for employees and the community. For example, in May 2011, R. J. Corman, Central Bank, and Taylormade Farm invited their employees along with their families and friends to participate in a free 5K race on the course. R. J. Corman provided dry-fit t-shirts, food, and prizes for the 400 people that attended the event. Over 65% of participants were R. J. Corman employees, families, and friends. R. J. Corman hosted another employee race in July 2011. This was an even greater success.

## Snapshot

**Industry:** Transportation

**Number of Employees:** Over 900

**Self-Insured:** No

**Age of Program:** 3 years

**Headquarters:** Nicholasville, Kentucky

### *Bicycles Available*

In 2008, the company purchased 11 bicycles displaying the company logo to keep onsite for employees to ride during lunch. Periodically, R. J. Corman reopens the facility on Thursdays from 6:30-8:30 p.m. so employee and their families can bike, walk, or run along the trails. The bicycles are available from April to October and employees sign a waiver before using a bicycle.

### **Results**

R. J. Corman has experienced a variety of positive results from its health and wellness program. These results include employee weight loss, an increased awareness of health and wellness, and in one instance the “total transformation” of a previously sedentary employee who trained for and successfully completed a Half-Ironman Triathlon.

The company has also seen changes in its health care costs, which have stayed constant or decreased in four out of the last five years. R. J. Corman’s health care costs are shared between the employee and employer and are based upon the previous year’s costs. In 2010, health care costs decreased significantly, allowing the company to refund a portion of the premium (between \$250 and \$1,000) to employees.

### **Next Steps**

As Howard explains, R. J. Corman’s health and wellness program is in an “infinite state of change.” The company is constantly looking to improve and grow its program. One example is the new fitness center being built at its headquarters. This facility will have a track with 22 televisions lining it, exercise equipment, showers, and locker rooms and will serve as another fitness resource for employees. The facility will open in early Fall 2011.

**“If you want an  
active employee,  
you want his or her  
family to be active too.”**



## Employee and Executive Champions Promote Wellness

SHPS gives *Health Happens Here* a personal feel by (1) engaging employees in programming development, (2) sharing executive testimonials that support each focus area, and (3) sharing blog diaries of four employees “achievers”.

### Company Overview

SHPS, Inc. provides benefits administration services, medical management software, and health improvement programs to employers, government agencies, and third-party administrators through its Carewise Health®, Landacorp, and SHPS brands. The company was formed in 1997 and is headquartered in Louisville, Kentucky. SHPS employs almost 2,000 people in its Arizona, Kentucky, Pennsylvania, and Minnesota locations; 1,200 employees are located in Kentucky.

### Initiative Overview

SHPS started *Health Happens Here* in June 2010 as a directive from its CEO to create a culture of health within the organization. The core objectives of the program were to integrate health into the corporate culture and create a workplace that fosters healthy lifestyles and decision-making. SHPS supports employees in their pursuit of a healthy lifestyle through engagement in healthy activities, helping employees to make lasting health and wellness changes, and by making healthy choices at work easy.

At a basic level, SHPS’ wellness program provides employees with education and activities around fitness, nutrition, and stress management/reduction. However, *Health Happens Here* has become more comprehensive by making the initiative personal for employees through (1) creating a sense of ownership toward activities employees help to develop, (2) sharing executive stories about their challenges and accomplishments related to wellness, and (3) regularly profiling four employee “achievers” as they improve their health in the *Journey to Health* challenge.

### Implementation

By implementing *Health Happens Here*, SHPS aims to: (1) provide employees with the opportunity to strengthen their minds, bodies, and spirits, (2) challenge leadership to create and foster a culture of health, and (3) encourage employees to take responsibility for their health and hold them accountable for positive change.

#### Employee-Driven Program

SHPS had elements of a wellness program in place before the implementation of *Health Happens Here* but expanded it in 2010 to provide a full-scale wellness initiative and improve engagement in response to its employee engagement survey. The comprehensive wellness initiative is driven by human resources with support from the marketing department and the company’s health coaches. Through wellness ambassadors and committees, the initiative has grown organically within the parameters established by corporate. It is personal to employees because they are involved in its creation, generating employee buy-in.

#### Executive Sponsor

SHPS’s corporate leaders foster a culture of health by assigning executive sponsors for each area of focus — nutrition, fitness, and stress reduction/management. By having an executive sponsor, SHPS is able to communicate leadership support for the initiative as well as promote leadership modeling of healthy behaviors.

## Snapshot

**Industry:** Health Care

**Number of Employees:** 2,000 (1,200 in Kentucky)

**Self-Insured:** No

**Age of Program:** 1 year

**Headquarters:** Louisville, Kentucky

### Health-Related Awards:

- Start-Up Award, Greater Louisville Inc.'s Mayor's Healthy Hometown Worksite Wellness Awards (July 2011)
- American Heart Association's Gold-Level Start! Fit-Friendly Worksite Recognition (May 2011)
- *Business First's* Greater Louisville's Healthiest Employers' Finalist (1,500-4,999 employees category) (August 2010)

The company includes articles about the executive sponsors on its internal website, oneSource. For these articles, the executives are asked questions related to their particular area of focus. For example, SHPS CEO Rishabh Mehrotra is the executive sponsor for nutrition. His oneSource story highlighted his grocery shopping habits, cooking methods, and the importance of his family dinner routine. Through the executive sponsorship, each focus area has a face and name associated with it, making it real and personal for employees.

### *Journey to Health Challenge*

SHPS offered a six-month *Journey to Health* challenge in which four employee "achievers" took responsibility improving their well-being. Each employee achiever blogged on a weekly basis about his or her positive lifestyle changes regarding nutrition, fitness, and stress reduction/management. The employees were

encouraged to be honest and to share accomplishments as well as struggles on the blog accessible to all employees through the company intranet. The open and honest blogging created accountability and motivated other employees to make healthy lifestyle changes.

The employee achievers for the *Journey to Health* challenge were selected through an application process. Invitations for applications were sent to SHPS' two largest locations — Louisville, Kentucky and Scottsdale, Arizona — as achievers from these offices would have the most visibility. The application asked about struggles, barriers, health issues faced, and what each applicant hoped to accomplish through the challenge. Through a two-week process, Health and Wellness employees collected interviews and selected achievers who were honest, open, and able to effectively communicate their story while working through issues other employees could relate to.

After the four achievers were chosen (two from each location), each was asked to participate in all activities and programs associated with *Health Happens Here*, allow cameras to document their progress, and blog on a weekly basis. An excerpt from one of the achievers' blogs is included below.

*"I am learning a lot from participating in this program; my health coach is really teaching me a lot about nutrition. She has explained what good fats and bad fats [are] and why they are good and bad. She has also explained what foods contain the good and bad fats. This is a lot to absorb, but as time goes on I will learn to incorporate all of this information into my daily life."*

# SHPS, Inc.

## Results

As a result of the program, the company's environment has changed. The progress of creating a culture of health is evident by the changes taking place at the individual offices: indoor and outdoor walking paths, team walking meetings, allowing only healthy food choices for department get-togethers and offering healthier options in the cafeteria and vending machines. JC Gibson, Executive Vice President of Human Resources, states that "*Health Happens Here* has also played a role in helping decrease our average claims cost per employee as well as bending the upward trend curve in our health care costs."

Employees also feel more comfortable talking about health. Marketing Manager Allison Kohler elaborates, "It is OK now to talk about health issues and admit, yes, I have this problem or I struggle in this area. So maybe we have taken a little bit of that shame away." An excerpt from another achiever's blog describes the effect their writing is having on co-workers:

*"I am starting to get feedback from others out there that read this blog that because of some of the changes I have made in my diet and schedule, they are doing the same. People are thinking twice about choices they make and have the mindset that if I can do it they can do it. It is nice to get feedback like that. Because I know you are looking to me for inspiration, it makes me even more conscious when I think about having a sweet tea."*

## Next Steps

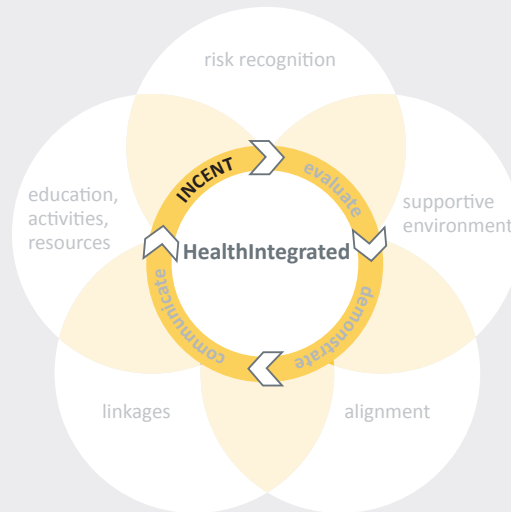
Building upon the successful first year, SHPS plans to continue to offer programs that are employee-driven and that meet the needs of their employees. SHPS plans to work with management teams to help them better understand and create a work-life balance that encourages a culture of health. The company also plans to expand *Health Happens Here* to target health issues that drive up health care costs (e.g., smoking cessation, weight management, and diabetes).

**"It is OK now to talk about health issues and admit, yes, I have this problem or I struggle in this area. So maybe we have taken a little bit of that shame away."**

INNOVATION  
AT A GLANCE

Incent

Central Bank and Trust's  
Weight-Loss Program



▶ Leveraging the motivation that friendly competition inspires, Central Bank hosts weight-loss competitions, modeled after “The Biggest Loser”, among employees. Initially, the program was designed to last twelve weeks, after which a weigh-in would honor a 1st, 2nd, and 3rd place “loser.” Prizes were \$500, \$350, and \$200 cash incentives. Halfway through the bank’s first competition, Executive Vice President and Director of Human Resources, Rose Douglass, received feedback from the bank’s wellness consultant that the effort would be more successful if it was sustained, rewarding longer term lifestyle changes. Starting immediately, the bank created a six-month challenge, splitting the cash incentive between two weigh-ins.

Although sometimes the 12-week winners also win the 6-month weigh-in, Douglass has found that the addition of the second phase allows other employees an opportunity to celebrate weight-loss. According to Douglass, the six-month timeframe works well. It is “not so far away that employees do not see the light at the end of the tunnel... yet it is far enough that hopefully we have helped someone change daily habits, and they are not going to go back to what they used to do.”

In total, the bank invests \$1,050 in incentives per weight-loss program. Over the past three years and seven competitions, 166 employees have participated. Employee feedback from the program has been positive, helping participants see beyond short-term incentives. A simple and inexpensive competition helps employees lose weight, which in turn helps them avoid health problems. This is a win-win for the bank and its employees. One participant shared, “I think that it’s a great idea. We shouldn’t be in this for the money. We should be in this to have a better life and be there for our families.”

# WellPoint, Inc. (Anthem Blue Cross and Blue Shield)

## Making a Point to be Well at Work

In its Kentucky offices, WellPoint's Anthem group ensures that employees have access to resources that will support healthy nutrition and exercise.

### Company Overview

WellPoint, Inc. (WellPoint), a health benefits company, was formed in 2004 when WellPoint Health Networks, Inc. and Anthem, Inc. merged. The company is an independent licensee of the Blue Cross and Blue Shield Association. WellPoint has over 37,000 associates across the United States and does business in Kentucky as Anthem Blue Cross and Blue Shield. Anthem employs 1,100 associates in Kentucky at offices in Bowling Green, Shelbyville, Lexington, and Louisville.

### Initiative Overview

WellPoint has a company-wide wellness initiative called *My Health* which includes medical, dental, prescription drug, and wellness programs. Among the offerings within the wellness program, the company provides health risk assessments, Weight Watchers @ Work, free annual flu shots, an annual fitness challenge, a "Walk at Lunch" promotion, onsite cafeterias that subsidize healthy options, onsite wellness centers at larger facilities, tobacco cessation services, educational kits for associates, and monthly teleseminars. Additionally, the corporate office encourages local, state-level affiliates to develop wellness initiatives tailored to the needs of their workforce. As Director, Wellness Programs, Pam Ventura explains, "While we can offer corporate programs we have to have that local understanding and presence to make sure we are offering something that works. Local offices have been a key part of the strategy over the last five years." Overall, WellPoint initiated *My Health* to improve both associate well-being and to stabilize corporate health-related costs.

Kentucky's WellPoint offices, where Anthem employees are located, have implemented a statewide wellness initiative referred to as *Make a Point (MAP) to be Well*. With budgeted funds and support from the corporate office, Kentucky's Anthem group has developed programs that meet workforce

and organizational needs. The Anthem offices strived to increase access to wellness-related resources that complement corporate offerings. For example, an onsite wellness center is available to associates at a larger Louisville location and in smaller locations, a gym membership reimbursement is available instead. Other wellness-related resources include visits from a mobile mammography van, an automated blood pressure machine, indoor and outdoor walking paths, health stations equipped with thermometers, first aid kits, and an annual health fair.

By marketing the state-level initiative as *Make a Point (MAP) to be Well*, a positive, optimistic tone was set for the program. Along with the name a logo was created that portrays an employee on the mast of a ship looking out to sea. Sandi Wehrle, Human Resources Administrative Assistant in Louisville explains, "The logo portrays looking out to the future and to the horizon to see what your wellness future can be." With a name, a logo, and data to guide the program, Anthem's wellness committee focused its *Make a Point to be Well* initiative on creating an environment that supported healthy eating, emotional well-being, and exercise.

### Implementation

Formalizing and branding the wellness initiative allowed Anthem's Kentucky affiliates to integrate established aspects of the wellness initiative with new programs and opportunities. These include the onsite wellness center, wellness committees, and the health fair. Thus, when corporate WellPoint began *My Health* in 2005, this new program strengthened the wellness-related programs already in place and provided funding and corporate support for further development.

## Snapshot

**Industry:** Insurance

**Number of Employees:** approximately 37,000

**Self-Insured:** Yes

**Age of Program:** 5 years

**Headquarters:** Louisville, Kentucky

### Health-Related Awards:

- American Heart Association's Gold-Level Start! Fit-Friendly Worksite Recognition (2010)
- Greater Louisville Inc's Mayor's Healthy Hometown Worksite Wellness Award (2007)
- National Business Group's Gold Award for Best Employers for Healthy Lifestyles (2007, 2008, 2009, and 2010).

In 2010, Anthem's Kentucky associates were surveyed and 2008 health care claims data was evaluated to determine how best to focus wellness resources. Results from these two measures suggested that nutrition, exercise, and depression were key areas that needed to be addressed through the state-level wellness initiative. The Kentucky team's approach to wellness is highlighted here.

### Eating Well

To provide support for a healthy diet and to build knowledge about nutrition, Anthem Kentucky created a "Tasty Tuesday" event. For Tasty Tuesday, food vendors were invited to the onsite cafeteria to bring samples of new and healthy products. Associates could try new foods and receive nutritional information about what they were sampling. Tasty Tuesdays occur each week during two months out of the year for a yearly total of 8 occurrences. Additionally, a nutritionist has been brought in for consultations with associates.

### Exercising on Site

In addition to increasing opportunities and awareness for healthy eating, the wellness committee encourages employees to get out and get active. Indoor and outdoor walking trails are well-signed with information about mileage. Associates may walk any time during the day and trail maps (for indoor and outdoor routes) are available in the corporate wellness center. Associates also have access to the wellness center, The Body Shop. The wellness center is open from 5 a.m. - 11 p.m. on weekdays and from 6 a.m. - 6 p.m. on weekends, providing access to employees before, during, and after the work day. Use of the center is free to employees. Anthem associates who work more than 5 miles from the Louisville Triton location are eligible for the maximum of a \$35 monthly fitness membership benefit.

Additional emphasis on physical activity includes a recent "Take the Stairs" campaign. The first step in the campaign was to make the stairwells more attractive by hanging framed posters on the walls. Next, an incentive was administered to encourage stair use. Sign-up sheets were hidden in revolving locations in the stairwells (during designated periods). Employees who found the sheets and signed their names are entered into a prize drawing. In 2010, drawings included weekly door prizes and one grand prize drawing. The sign-up sheet is moved daily during the work week, so associates can engage in the challenge each day. To communicate about the project, signs were placed by the stairs and the elevators. Wehrle explains how this motivates team members to use the stairs, "people start talking about where they found the sign-in sheet or if they found it. They start searching for it, which makes them take the stairs!"

### Emotional Well-Being

The wellness committee has worked to educate employees about the many resources available through the Employee Assistance Plan (EAP). The committee runs promotions throughout the year that encourage associates to take advantage of the free and confidential resources that are offered. Employees can access a wide range of counseling services through the EAP. These include, but are not limited to legal advice, financial counseling, and mental health referrals.

# Wellpoint, Inc.

## Results

Two associate surveys, conducted in 2010, have been used to solicit information about the *Make a Point (MAP) to be Well* program. Questions asked about wellness, knowledge of programming opportunities available, what participants have learned from the program's activities, and what could be improved. According to Wehrle, "I do see just a slight turn of events where people are really interested in their health. I really think people realize that they have a lot of control and they can make the choices if they want to." Given positive survey feedback, the Kentucky-based initiative will continue to focus on the three areas designated as priorities through the previous assessment: nutrition, depression and physical activity. By utilizing both local and corporate resources, Anthem hopes to see a continued positive change in employee attitudes and behavior.

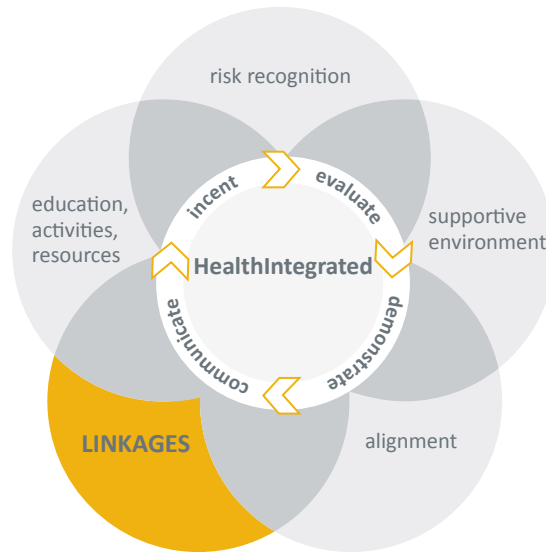
## Next Steps

The Wellness Committees have already established many goals for the coming year and beyond. Related to nutrition, "Tasty Tuesdays" will evolve by offering taste test and nutritional content comparisons of regular and low-fat items to help people make better informed decisions at the grocery store. Wehrle would also like to create opportunities to educate employees about label reading and grocery shopping, as she notes that "a lot of people don't really know where to begin. There are a lot of tools out there...It is just a matter of getting your mindset to change. You can throw carrot sticks in your purse as easily as you can candy bars."

Related to exercise and fitness, next steps include certifying corporate office's outdoor walking trail as a "Mayor's Mile" in Louisville, continuing the "Take the Stairs" campaign, promoting the corporate-sponsored 5K race, and perhaps starting a walking club or a "Biggest Loser" competition.

The wellness team will also continue to educate associates about many services they can access through the EAP.

**"While we can offer corporate programs we have to have that local understanding and presence to make sure we are offering something that works. Local offices have been a key part of the strategy over the last five years."**



# Linkages

**Wellness goals are linked with other workforce-related programs including occupational safety, corporate social responsibility, employee engagement, talent management, and work-life fit.**

**Linking health-related initiatives with other organizational programs helps to ingrain them into the firm’s culture and establish employee well-being as an organizational priority.** Despite the positive relationship between healthy employees and many indicators of organizational performance,<sup>17</sup> many organizations’ wellness initiatives remain siloed, with goals, budgets and staff that are not fully integrated into the organization’s operations. This practice highly limits the scope of what an

organization can achieve.<sup>17</sup> According to a panel of Fortune 500 executives queried in a recent study, “effective [health and productivity management] programs are embedded into organizational infrastructure, such as benefit design, compensation practices, disability policies, and the physical environment or ecology of the organization.” This employer panel further stressed that this “link” cannot be superficial but must truly reflect the organization’s mission and business objectives.<sup>16</sup>

**Featured companies (in alphabetical order):**  
***Benefit Insurance Marketing • Central Baptist Hospital***  
***EQT Corporation • Frankfort Regional Medical Center***

# Benefit Insurance Marketing

## Corporate Culture Promotes Wellness

Benefit Insurance Marketing (BIM) links its wellness initiative to its work-life fit, corporate social responsibility, and employee engagement initiatives.

### Company Overview

Benefit Insurance Marketing (BIM) offers its employer clients employee benefits solutions with the purpose of enhancing the “quality of life of those we serve.” This is done by supplying clients with comprehensive benefits that provide protection in devastating situations and working with clients to help improve the health of their employees. The Lexington-based company was established in 1980 and has 28 employees.

### Initiative Overview

BIM is unique in that it links its wellness initiative, which started in 2007, with many other workplace practices and programs. Wellness is linked to workplace flexibility, corporate social responsibility, employee engagement, and work-life fit. The company understands that wellness includes emotional and physical well-being and works to ensure that company policies and programs foster those aspects of well-being through self-improvement and self-care. BIM’s wellness initiative offers all employees multiple opportunities to learn and to engage in healthful activities such as annual biometric screenings and health risk assessments, behavior change activities, access to a health coach, an onsite treadmill, healthy snacks, and an Employee Assistance Program.

BIM leverages its workplace flexibility initiative to encourage employees to find a healthy work-life fit and participate in its wellness initiative. Flexible work options offered at BIM are not viewed as a part of the wellness initiative itself; rather the two strategically complement one another. The use of flex hours and as-needed flexibility promote a good work-life fit for employees resulting in reduced stress. BIM also provides an onsite Employee Assistance Program to help its staff work through stressful situations, whether they be professional or personal in nature.

Linkages between corporate social responsibility and wellness enhance a “pay it forward” culture within the company and affirm employees who see that their work is having a positive impact on others in the community. This linkage is representative of the company’s commitment to emotional health and wellness.

BIM believes employees will be more likely to participate in a wellness program if they are engaged in the establishment and design of the program itself. Employees who are engaged in the wellness program are, in turn, more engaged in their jobs and in the company. In order to ensure that the wellness initiative is well-received, the company has worked to ensure that employees are engaged in the decision-making process related to the program. Employees serve as the “Wellness Champion” on a rotating basis, allowing for a wide range of input into how the program should be operated.

### Implementation

In 2007, BIM created its wellness initiative. The initiative was—and still is—viewed as an opportunity to demonstrate that the company cares about its employees and wants to help improve each individual employee’s emotional and physical well-being. Linkages between work-life fit and flexible workplace practices, corporate social responsibility, employee engagement, and wellness demonstrate the company’s global approach to employee wellness.

### Work-life Fit

BIM offers numerous flexible work arrangements to employees to enhance their work-life fit and reduces stress. Account Manager Ellie Burnside explains, “Our culture embraces workplace flexibility and work-life balance and offering a wellness program at work enables several employees to juggle work-life and exercise a lot more easily.” For example, an

## Snapshot

**Industry:** Insurance

**Number of Employees:** 28

**Self-Insured:** No

**Age of Program:** 4 years

**Headquarters:** Lexington, Kentucky

employee may choose to come in early or stay late to take advantage of the onsite fitness equipment, extend a lunch hour to fit in a robust walk or jog, or use the company's Friday Flex Hours to engage in other activities that benefit the body and mind. For Friday Flex, employees have the choice of taking a partial lunch, coming in early, or working late in order to take extra time off every other Friday afternoon. The only caveat is that schedules must be coordinated with immediate co-workers to prevent any business interruption for clients. Client Service Manager Jan LaBonde describes how this supports BIM's wellness initiative, "The ability to have even a small amount of flexibility in the work week allows employees to create more 'margin' in their lives, especially in dealing with children, daycare, and schedules which, in turn, reduces stress."

BIM also takes strides to improve its employees' work-life fit by offering an onsite Employee Assistance Program to help staff work through stressful situations, whether personal or professional. BIM offers this service through CareWorks, who provides a representative that visits the office on a consistent basis in an effort to get to know the employees. That particular care worker, or another from the company, is available to BIM staff for individual or family counseling should it be needed.

### *Corporate Social Responsibility*

BIM wants employees to value their work, their coworkers, and their community. By viewing emotional well-being as a part of wellness, the company is able to also make linkages between corporate citizenship and wellness. One example of this linkage is the unique "pay it forward" attitude that Owner and CEO Briggs Cochran has shared with employees. In the fall of 2008, Cochran challenged employees with paying forward \$200. Each employee was given \$200 to pay forward through charitable donations, random acts of kindness, etc. The only parameter was that the employees would share their stories with one another. "This really made us feel good about our workplace," says LaBonde, "it is a part of our emotional wellness."

### *Employee Engagement*

Engaging employees in all aspects of operation and decision-making is part of the BIM culture. Fairness and teamwork permeate all aspects of day-to-day work. Cross-training and engagement with all aspects of the business allows for flexibility practices to work, and employee engagement in the development of the wellness initiative "keeps it fresh and makes it relevant to employees" according to LaBonde. By allowing different employees to be the "Wellness Champion," the company ensures that different voices are heard, and new ideas are brought to the table. Employees drive the direction of the wellness program with full support from management. By allowing employees to have input into wellness activities and events, monthly wellness Lunch and Learn events have a 95% participation rate. Topics such as portion control, the munchies, low-resistance exercise, stretching, and self-talk are driven by what employees want to learn.

These linkages between wellness, flexibility and work-life fit, corporate social responsibility, and employee engagement make the wellness program an integral part of the corporate culture at BIM.

# Benefit Insurance Marketing

## Results

BIM's wellness initiative is working to reduce stress, create work-life fit, promote healthy eating choices, and encourage exercise. As a result, BIM has seen an improvement in several biometrics for the 2009-2010 year as compared to the previous year. These include:

- **18%** decrease in triglycerides
- **14%** improvement for the total cholesterol to high density lipoprotein (HDL) cholesterol ratio
- **9%** decrease in cholesterol
- **8%** decrease in low density lipoprotein (LDL) cholesterol

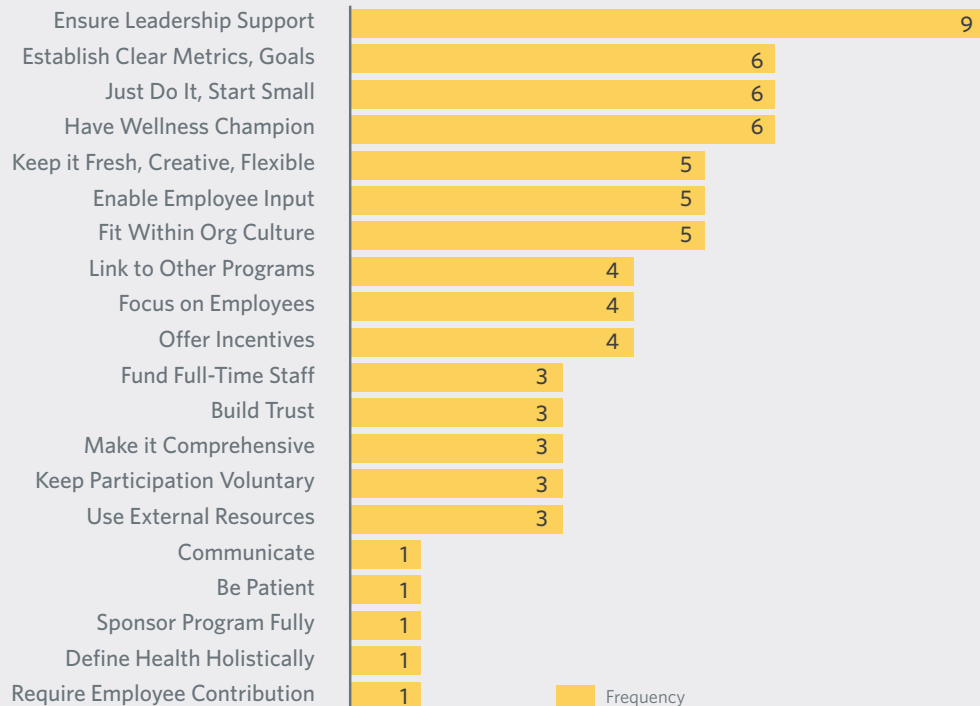
- **3%** increase in HDL cholesterol
- **3%** decrease in diastolic blood pressure
- **1%** decrease in systolic blood pressure

## Next Steps

BIM's wellness initiative is always changing. With a new "Wellness Champion" in place, the program will likely take on a new shape in the next year. Opportunities for friendly competition between units, new topics for Lunch and Learn seminars, and increased opportunities for onsite fitness have all been discussed.

**“Our culture embraces workplace flexibility and work-life balance and offering a wellness program at work enables several employees to juggle work, life, and exercise a lot more easily.”**

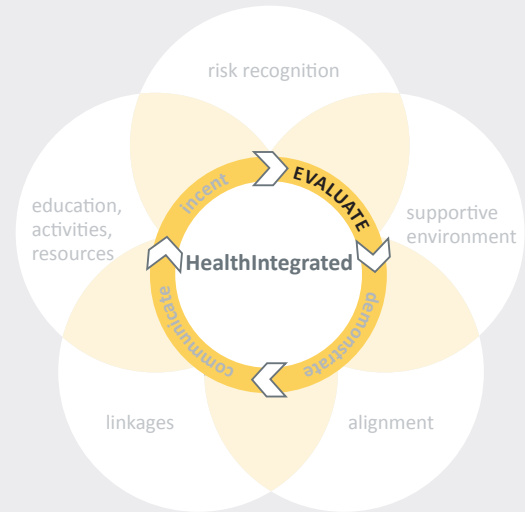
## In a Nutshell: What would Kentucky employers recommend to others wanting to create a healthy organization?



## INNOVATION AT A GLANCE

# Evaluate

## LG&E and KU's Evolution in Evaluation



**Evaluation has always been central to LG&E and KU's wellness initiative.** Here, four evaluation approaches and their results are profiled, demonstrating the company's evolution and use of specific evaluation practices.

In 1998 a graduate student from University of Louisville's School of Nursing studied LG&E and KU's wellness program participation, sick leave, and workers' compensation claims. Results from this study of 500 employees indicated that program participants used 20% less sick time than nonparticipants. Additionally, participants did not file any workers' compensation claims during the year studied. This study and its positive results laid the foundation for ongoing evaluation.

In 2005, LG&E and KU explored the relationship between company-sponsored flu vaccinations and absence rates, specifically comparing sick leave from 2003 (a year when the company offered flu vaccines) to 2004 (a year when it did not). In 2004, employees logged over 12,000 more sick leave hours. This simple study allowed the company to determine the importance of offering flu vaccinations.

In 2007, LG&E and KU conducted a confidential internal survey to evaluate the effectiveness of screenings to identify health risks. Employees were asked **(1)** if they had identified a health problem through participation in screenings, and **(2)** what follow-up actions they had taken. Results from over 600 employees revealed that 90% began a newly

prescribed medication based on information revealed during the health risk screening, 70% made improvements in their diet, and 60% started an exercise program.

The impact of the company health fair (which offers screenings, vaccinations, and educational materials to participants) on employee health and wellness has also been evaluated. Participation data from 2008-2010 has shown improvements in almost every risk factor among a 1,000 employee sample. Results include a 4.8% improvement in triglyceride levels and a 4% drop in glucose levels.

Similarly, in 2009 LG&E and KU compared the health care costs of health fair participants and nonparticipants. The analysis found that health fair participants spent 20% less on health care, took 22% fewer prescription medications, spent 28% less for the medications that they were taking, had 36% fewer hospitalizations, and experienced 24% fewer emergency department visits.

Each of these demonstrates the importance of evaluation in determining the effectiveness of wellness programs. LG&E and KU is self-insured, so it is important that employees understand the benefit of wellness offerings that can lead to cost containment and better health. Barbara Hawkins, Health and Safety Manager, sums it up, "all those costs — every MRI, every surgery — comes right off the bottom line... so if we can keep those health care costs down, we hopefully can reduce costs for everybody."

# Central Baptist Hospital

## Making the Link between Employee Development and Wellness

Central Baptist Hospital integrates employee wellness into its hospital-wide strategic plan, thus linking wellness initiatives with employee engagement and workforce development and aligning employee well-being with its strategic business objectives.

### Company Overview

Central Baptist Hospital (Central Baptist) is a 383-bed acute-care, medical, research, and education center and is one of five hospitals in the Kentucky-based Baptist Healthcare System. Central Baptist Hospital has 2,600 employees and is headquartered in Lexington, KY.

### Initiative Overview

Since 1998, Central Baptist Hospital has offered limited fitness and wellness services. These offerings greatly expanded in January 2010, when the hospital officially opened a full-service fitness and wellness facility: HealthwoRx. Through HealthwoRx the hospital offers employees access to multiple vaccinations, work-out facilities, access to trainers and nutritionists, and biometric and behavioral health risk assessments. In addition to the traditional health and wellness offerings outlined above, Central Baptist supports employee health more fundamentally by making it a part of the hospital's overall strategic plan.

In January 2010, a multidisciplinary team—consisting of representatives from clinical and non-clinical units, human resources, and management—initiated the development of a workforce strategic plan to be incorporated into the hospital's overall strategic plan. The team met for six months creating objectives targeting employee wellness including emotional well-being. The team adopted a mission statement for the plan: *to create and maintain an environment that is characterized by meaningful work, employee engagement and professional enrichment for the entire workforce.* After careful work and consideration, engaging the workforce and creating a healthy workforce emerged as key focus areas for the workforce strategic plan. As Vice President Larry Gray, MHA, explains, "Employee wellness and organizational wellness both consider physical fitness and health risks, but also include finding ways that the hospital can respond to the emotional stressors that keep employees up at night. We are committed, through our strategic plan, to be intentional about addressing these."

By adopting this workforce plan into its overall strategic plan, the hospital not only aligns employee health with its organizational strategy, but it links its wellness initiatives with workforce development and employee engagement.

### Implementation

Included in the workforce strategic plan was the use of an employee *Life Stressors Survey*. Gray explains, "Anecdotal information around the hospital has suggested that there were a lot of stressors impacting our employees. These stressors could be impacting our employees and our patient care." In order to understand and attend to these stressors, a team created a web-based, anonymous *Life Stressors Survey* to be distributed to all employees in 2011. The hospital committed to responding to employee needs by using data from the survey to enhance existing wellness offerings and to create new offerings. Leadership understood that this was directly related to the workforce strategic plan's goals of engaging and creating a healthy workforce.

### Results

#### *Employees Respond, Revealing Sources of Stress & Opportunities for Change*

The employee survey, which is ongoing in 2011, has already provided valuable information to administrators. The 2011 survey provides baseline data for the hospital to use in order to create and enhance wellness programs and resources. The survey results surprised the administration team, who had assumed—based on anecdotal information—that employees would be most stressed about work-life fit and balancing family caregiving and work responsibilities. Preliminary survey results (which have shown that caregiving is very stressful for one sub-group of employees: those dealing with issues of elder care. Almost 550 employees indicated that elder care was a major life stressor. Financial concerns and future work were also named as primary stressors. Results indicate that many

## Snapshot

**Industry:** Health Care

**Number of Employees:** 2,600

**Self-Insured:** No

**Age of Program:** 13 years

**Headquarters:** Lexington, Kentucky

employees have multiple and significant life stressors. Of 611 respondents to the survey, the following stressors were revealed:

### *Elder Care (548 respondents)*

- **25%** indicated a lack of information and community resources for aging parents was a source of stress
- **18%** indicated they would benefit from emotional and informational support related to elder care while at work

### *Financial Well-Being (542 respondents)*

- **48%** identified retirement planning as a stressor
- **41%** identified family budgeting and financial management as stressor
- **35%** would be interested in personal and confidential financial counseling

### *Career Development and Future Work (523 respondents)*

- **33%** would benefit from professional coaching/career enhancement services
- **29%** would like financial assistance for continuing education

### *Using Data to Set Target Areas*

One surprising element to the survey results was that the hospital already offered programs to address some of the stressors that most-affected its employees. Educational resources for retirement preparation were available through its retirement broker, career coaching was available to clinical staff, and employee assistance programs had been in place with the intent to help workers through stresses from all sources. Through this evaluation process, Central Baptist realized that the programs were either underutilized by those who truly needed them, or they were not effective in achieving their desired goals.

Gray explains, "We have career coaches available for the nursing department and this made us aware of the need for career coaching or parallel services for other clinical and non-clinical

employees as well. This is important to us, because we want employees who feel good about their job, the organization they work for, and themselves. Investing in careers improves performance."

Consequently, based on results from the *Life Stressors Survey*, Central Baptist realized that it needed to **(1)** possibly tweak/expand the programs to ensure that it met employee needs and **(2)** improve the way that it promoted these programs to make sure employees had knowledge of and access to them, **(3)** in some cases expand access to certain programs.

### *Linking Programs with Similar Objectives*

In order to ensure that employee needs were met with relevant programming, Central Baptist has linked various programs that address the same root stress (such as Employee Assistance Program [EAP], Pastoral Care, and Financial Well-Being Programs). In response to elder care stressors, over 50 employees are now participating in an ongoing support group for children caring for aging parents, led by the Pastoral Care department. The hospital is exploring linkages with community resources and consultants for additional support for the different life stressors. Additionally, employees themselves are being mobilized to help the organization identify meaningful support.

If needed, the hospital also plans to create new responses to these stressors. By tracking results from subsequent survey results, Central Baptist will be able to measure its effectiveness at meeting employee needs in future years.

### *Next Steps*

Central Baptist revises its strategic plan every three years. The current Workforce Strategic Plan was written to guide the organization through 2012. This has been such a helpful activity that the hospital expects to continually improve the planning and development process to assess employee well-being and stress for years to come.

*"Investing in careers  
improves performance."*

# EQT Corporation

## Wellness & Safety go Hand-in-Hand

The *Take Charge EQT Wellness Program* is linked with the safety group as a way to increase participation and engagement in wellness initiatives and improve the safety and health of the workforce.

### Company Overview

EQT Corporation is a natural gas producer operating three units (EQT Production, EQT Midstream, and Equitable Gas Company) in Kentucky, Pennsylvania, Virginia, and West Virginia. The company was founded in 1888 and is headquartered in Pittsburgh, Pennsylvania. EQT has more than 1,800 employees; 250 are located in Kentucky.

### Initiative Overview

EQT's wellness initiative, *Take Charge EQT Wellness Program* (*Take Charge*), started in 2004 and focuses on detection, disclosure, and education. Director of Compensation and Benefits, David Smith, describes the initiative, "*Take Charge* provides education and tools on a wide variety of health and wellness issues, but only employees can take the actions that will improve their health and well-being."

Within the natural gas industry, safety is at the forefront of operations and is recognized by employees as essential. Therefore, in order to emphasize the importance of wellness, the *Take Charge* team has partnered with EQT's safety group to ensure that employees understand the value of the wellness program. This partnership links the two programs and underscores the significant linkage between wellness and safety. A healthier workforce will be more alert and safer, and a safer workforce will ultimately be healthier. While the relationship between these two initiatives seems a natural fit, EQT's creation of this linkage is innovative.

EQT's original health and wellness program offered biometric screenings and seminars to employees. When *Take Charge* was created in 2004, EQT realigned the program with an emphasis on detection, disclosure, and education. *Take Charge* has evolved to provide employees with the opportunity to **(1)** discover health risks and work toward prevention through free physicals and a health risk assessment (detection),

**(2)** discuss current medicines and their effects on work tasks with a nurse (disclosure), and **(3)** gain health and wellness education through seminars, health coaches, and online programs (education). Employees, spouses, and any other household dependents can take part in EQT's wellness initiative, and employees can earn financial incentives for participation.

### Implementation

Safety is EQT's number one goal. By making the link between the two related initiatives, leadership demonstrated their support for employee wellness. Smith explains, "Safety is critical in our operation, but so is wellness. So we are going to let the wellness and safety groups do it together." A formal working partnership between wellness and safety was created in 2005. This partnership formalized communication between the two groups and helped to create opportunities for employee buy-in to wellness initiatives.

**"Safety is critical in our operation,  
but so is wellness.  
So we are going to let the wellness  
and safety groups do it together."**

## Snapshot

**Industry:** Gas & Mining

**Number of Employees:** Over 1,800

**Self-Insured:** Yes

**Age of Program:** 7 years

**Headquarters:** Pittsburgh, Pennsylvania

In order for a wellness initiative to be successful, employees have to **(1)** know about it, **(2)** value it, and **(3)** take action. This is where the partnership with the safety team is essential: it greatly increases the exposure of the wellness program to employees. Safety meetings are mandatory and linked to bonuses and promotions for employees in the field (60% of EQT's employee population). As partners with the safety group, the *Take Charge* team can make 30-minute presentations at quarterly safety meetings where they are ensured employee participation. Therefore, EQT's concern is not getting employees to the meeting, but rather getting employees actively engaged in the wellness program.

Engagement is fostered in many ways. At safety meetings, employees are encouraged to share their success stories and help motivate co-workers to get involved. Incentives that are tied back into the wellness program are also used. For example, by completing a health coaching program employees receive \$300 in their health savings account. Additional incentives include cash for completing an annual physical exam.

## Results

EQT has created a scorecard to manage and evaluate *Take Charge*. The scorecard consists of the following metrics:

1. Number of physical examinations
2. Participation in health risk assessment
3. Number of inpatient stays
4. Number of outpatient stays
5. Emergency Department usage
6. Number of active employee deaths
7. Participation in programs offered by local medical center (i.e., health coaches, online programs)
8. Days away from work (absenteeism)

Through the above eight metrics, EQT has seen an increase in number of physicals and outpatient stays, and a decrease in inpatient stays. Specifically, by offering a \$750 incentive for employees to have a physical, the company went from 30% of its population getting a physical to all but three employees having a physical last year. Incentivizing risk assessment and health coaching has increased participation from 10 people to over 200 thus far in 2011. *Take Charge* has also resulted in a decrease in absenteeism, thus boosting productivity.

## Next Steps

Smith underscores the importance of being open to change: "Achieving health and wellness is an ongoing journey." Participation in the health and wellness programs has increased, and employees in the field are receiving the information they need to make changes. A challenge ahead is to ensure that corporate employees who do not attend regular safety meetings are also engaged in the initiative.

# Frankfort Regional Medical Center

## Living Well Thrives with Linkages

Frankfort Regional Medical Center links *Life: Live it Well* to both injury risk reduction and employee financial education. This cross-branding of wellness with other workforce programs increases awareness and utilization of the wellness program.

### Company Overview

Frankfort Regional Medical Center (Frankfort Regional) is a 173-bed hospital located in Frankfort, Kentucky serving Franklin, Anderson, Owen, Woodford, Shelby, and surrounding counties. The hospital's 700 employees use the company's service model, "Excellent Service, Every Patient, Every Time," to deliver care to patients.

### Initiative Overview

Frankfort Regional's healthy work environment initiative, *Life: Live it Well*, was created in 2008. The initiative works to maximize employee health as well as to maintain a healthy work environment. The wellness initiative includes a variety of educational opportunities and programs designed to encourage healthy living among employees and their families. Director of Human Resources Beverly Young describe the initiative, "*Life: Live it Well* assists, encourages, and incentivizes our employees to live a healthier lifestyle." The hospital links *Life: Live it Well* with other workforce-related programs such as its injury risk reduction and financial education programs. By doing so, Frankfort Regional is creating linkages across areas that are often viewed as distinct. Safety, wellness, and financial well-being all foster an overall sense of personal wellness, so formally connecting these three programs makes good sense.

*Life: Live it Well* is available to all employees (full-time and part-time) who are benefit eligible. Insured spouses and adult dependents are also eligible for a portion of the program. The program includes access to online newsletters and quarterly magazines with health-related content as well as an opportunity to complete an online, confidential Personal Health Assessment (PHA) which is incentivized to up to \$500. Employees who complete the PHA receive a Health Report Card with action recommendations and access to a wellness website that hosts more than 2 million pages of health content

and discounts on popular products and services. In addition, Frankfort Regional partners with the YMCA, paying the start-up fee and 50% of monthly membership fees for employees and their families.

### Implementation

*Life: Live it Well* was created by Frankfort Regional's parent company, Hospital Corporation of America (HCA), and is being expanded to HCA's hospitals nationwide through each hospital's Human Resources department. The wellness initiative is being rolled out in phases, and will ultimately become an inclusive program.

At the local level, Frankfort Regional is aware that other programs at the hospital work to support employees' well-being. Therefore, a conscious effort has been made to link the new wellness initiative to these other programs. By linking wellness to its injury risk reduction program and the financial education offered, Frankfort Regional enables these programs to support one another, ultimately benefiting employees and the hospital. This comprehensive and forward-thinking approach demonstrates Frankfort Regional's commitment to wellness.

### Injury Risk Reduction Program

Frankfort Regional's injury risk reduction program works to make the hospital environment safe for its employees by generating improvements that will prevent injuries and maintain a healthy workforce. These improvements include a range of interventions, small and large, such as placing umbrella bags by all entrances to help keep floors dry, adding lighting to the parking lot to increase nighttime visibility, hiring a snow removal crew that does an effective job of de-icing, adding security cameras in the back parking lot, and putting reflectors on stairs. Since Frankfort Regional fosters an open

## Snapshot

**Industry:** Health Care

**Number of Employees:** 700

**Self-Insured:** Yes

**Age of Program:** 2.5 years

**Headquarters:** Frankfort, Kentucky

communication channel that encourages employee input, most of these improvements were the result of employee suggestions.

As risk reduction and wellness complement one another, Frankfort Regional hopes to see a continual decrease in the number of employee injuries through participation in *Life: Live it Well*. As Young explains, “when employees are living healthier lifestyles and their overall health improves they are less likely to have certain types of injuries at work.” Because the wellness program increases awareness of overall health and wellness, employees are more cognizant of unsafe habits and behaviors that might lead to a workplace injury. When wellness and risk reduction programs are providing employees with similar messages, everyone benefits.

### Financial Education

A sense of financial well-being can reduce stress and consequently improve health. Recognizing this, Frankfort Regional links its financial education classes to its wellness program. Through the wellness program, employees become aware of the financial advising services offered. The hospital contracts with a financial adviser to provide employees with a workbook and a two-hour financial education class. The class covers topics such as buying a home and saving for retirement. One-on-one instruction is also provided, allowing employees time to discuss personal financial questions and concerns.

### Results

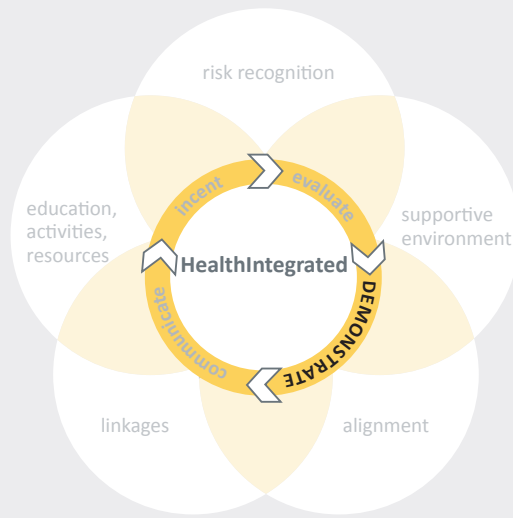
By establishing linkages between wellness, financial education, and risk reduction programs, Frankfort Regional has seen successes in all three areas. Since its inception in 2001, the injury risk reduction program has reduced the hospital's injury rate 34% (from 12.74 per employee in 2001 to 4.37 in 2009). Financial education classes have been very popular, and employees have advocated for continued and more in-depth classes to assist them in becoming more financially aware.

Frankfort Regional is using evaluation data to make sure the wellness initiative's focus is appropriate. The wellness program is collecting aggregate data from its Personal Health Assessments and health screenings, which will be used in the future to determine if health risks are being reduced for employees by comparing the data with prior years.

### Next Steps

In 2011, financial education continues with one-hour onsite classes, online classes, one-on-one sessions with a certified financial instructor, email access to a certified financial planner, and enhanced online resources. By providing this education, Frankfort Regional hopes to reduce employee stress, because as Young explains, “finances can be a huge stressor.” Additionally, Frankfort Regional will continue to encourage employees to provide suggestions for risk reduction and safety management. As *Life: Live it Well* continues to develop at the hospital, Young and her colleagues will continue to explore opportunities to link wellness to other ongoing initiatives in ways that can enhance employee well-being.

**“When employees are living healthier lifestyles, and their overall health improves, they are less likely to have certain types of injuries at work.”**



INNOVATION  
AT A GLANCE

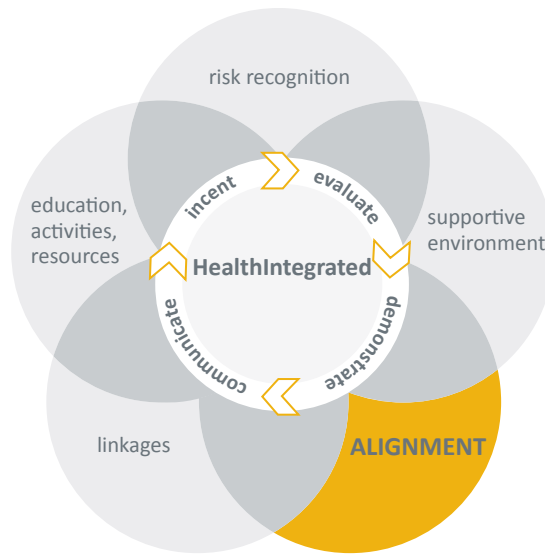
Demonstrate

R. J. Corman Railroad  
Group Demonstrates  
Commitment to Health

For the R. J. Corman Railroad Group, having a comprehensive wellness program has not been motivated by a desire to cut costs. From the beginning, it has been motivated by a desire to help employees and their families live healthier lives. Founder and Owner Rick Corman has made this clear to employees and to the public. Mr. Corman’s leadership style includes thinking big — and this translates to the development of the wellness opportunities his company has made available to employees. He also leads by example and demonstrates wellness as a lifestyle.

The company’s commitment to employee wellness is very visible through grand efforts — miles of outdoor walking/running trails that are lined with benches and cool water, as well as indoor recreational facilities that are prominent and pleasant to use. Over 400 runners recently participated in a company-sponsored 5K event for employee, family and friends. During the winter months, the company even generates snow to allow for cross country skiing in Kentucky’s inconsistently white winters. Although not as visible, efforts to ensure that employees have access to health screenings and opportunities to engage in wellness activities are also impressive. Onsite screenings are conducted at diverse times to accommodate employee schedules.

Mr. Corman is a very visible health champion within the company. Diagnosed with cancer ten years ago, he has very publicly chronicled his own battle with the disease. “Mr. Corman’s Medical Updates” are regularly posted on the company’s website demonstrating trust and transparency. A lifelong runner, he completed the Boston Marathon just five months after a bone marrow transplant in 2002 and continues to use the trails on his company’s Kentucky acreage. Mr. Corman has frequently engaged employees in fitness challenges and demonstrates his commitment to employee well-being through perennial sponsorship of 5K races in the community. Taken together, these examples demonstrate the company’s commitment to creating and facilitating good health.



# Alignment

**Employee wellness is integrated into organizational mission and core business objectives. Funding and staff are allocated with appropriate power and tools to ensure success.**

The concept of healthy organizations has been studied for over twenty years with a resounding theme surfacing in the results: for true organizational health to be achieved, the organization as a system must be the level of focus.<sup>41</sup> According to the results of many studies,<sup>45-48</sup> health promotion is more effective when conducted at the organizational

level (rather than at the department or group level) with specific programs or policies targeting the individual needs of employees.<sup>41</sup> For optimal employee and organizational performance results, employee well-being must be central to the way that an organization—as a human community—conducts business and views its strategic objectives.

Featured companies (in alphabetical order):

*Al J. Schneider Company* • *GE Appliances & Lighting*

*Kentucky Chamber of Commerce* • *LG&E and KU Energy LLC* • *Logan Aluminum*

# Al J. Schneider Company

## Incorporating Wellness into the Company's We CARE Strategy

Aligning Al J. Schneider's wellness initiative with its *We CARE* philosophy of talent management and service helps the company meet its strategic business goals of providing excellent service.

### Company Overview

The Al J. Schneider Company (Al J. Schneider) owns and operates the Galt House Hotel and the Crowne Plaza at the Louisville Airport. The company also owns Home Supply Company, a construction business, and multiple real estate holdings in the Louisville metro area. Al J. Schneider was established in 1972 with the construction of the Galt House and has 1,000 employees.

### Initiative Overview

Al J. Schneider formally introduced an employee wellness initiative in 2010, though the company had offered a variety of well-received programs in the two years prior to formalizing the initiative. The wellness initiative provides resources to encourage and raise awareness about healthy lifestyles with emphasis on diet, exercise, stress reduction, and reducing unhealthy habits (e.g., smoking). In each of these areas, employees can make changes that positively impact their health and wellness, which in turn positively impacts the company.

At Al J. Schneider, it made sense to align the wellness initiative with the corporate strategy - *We CARE* (which stands for Customer, Associates, Return on Investment, and Efficiencies). *We CARE* is an internal program that generates awareness to deliver high performance and create a positive work environment for employees. Through the wellness initiative, Al J. Schneider is working to establish a culture of health and promote healthy lifestyles. By reducing stress and creating a healthy, positive workplace, they are aligning wellness with *We CARE*.

The wellness initiative has a wide range of offerings, including health risk assessments (HRA), screenings, behavior change activities, an employee assistance program, educational opportunities (e.g., healthy cooking classes and lunch 'n learns), and environmental support (e.g., free or subsidized healthy food options and workstation ergonomics). Al J. Schneider is raising health awareness and encouraging healthy behavior changes for all associates. Benefits Manager, Denise Hoskinson, describes the company's perspective: "our wellness focus is straight forward: we provide the associates with the tools. All the associates have to do is bring their commitment." The wellness initiative is available to all employees and is not tied to their benefits package. Most programs are either free or partially reimbursed and can be attended while employees are on the clock. Hoskinson explains, "Our company is committed to providing valuable programs at a minimal cost to our associates."

Al J. Schneider has both long-term and short-term goals for its wellness initiative, many of which are aligned with its business strategy of providing excellent service. Some of the short-term goals include: communicating to associates that *We CARE* extends to employee health and wellness, further developing a culture of wellness for all associates, promoting behavior change toward healthier lifestyles, making health and well-being a priority, reducing stress, furthering the development of a fun, healthy, happy workplace, and using successes from its wellness initiative in recruitment. The long-term goals are to reduce health care costs, improve the health of associates, reduce absenteeism along with workers compensation claims, and to develop a reward system for the wellness initiative. The wellness initiative and its goals are in line with the organization's *We CARE* strategy.

## Snapshot

**Industry:** Hospitality

**Number of Employees:** 1,000

**Self-Insured:** Yes

**Age of Program:** 1 year

**Headquarters:** Louisville, Kentucky

### Health-Related Awards:

- *Business First's* Greater Louisville's Healthiest Employers Finalist (500-1,499 employees category) (August 2010)
- Fleur de Lis Award part, Greater Louisville Inc.'s Mayor's Healthy Hometown Worksite Wellness Awards (June 2010)
- American Heart Association's Gold-Level Start! Fit-Friendly Worksite Recognition (2010)

## Implementation

Al J. Schneider's wellness initiative evolved from a few programs offered in 2008 and 2009 (including Weight Watchers @ Work and a weight-loss contest). Feedback from associates was good, spurring the company's owner and leadership team to formalize a wellness program. A Wellness Team was created with representation from hourly and salaried associates from a cross-section of departments within the company. The Wellness Team worked to create the comprehensive wellness initiative that was launched in 2010.

### We CARE & Wellness Strategy

According to Hoskinson, the We CARE strategy "incorporates providing excellent service to our guests and a positive work environment for our associates. Hotel industry studies have shown that healthy and happy associates provide a better quality of guest service." Therefore, the company strives to provide opportunities for professional and personal growth and views its wellness program as "one such opportunity that has an immediate and potentially life-long impact."

Al J. Schneider's President Mary Moseley states, "Our Wellness Team is a great example of how we've chosen to invest in our people." Alignment of the organization's wellness initiatives with We CARE helps Al J. Schneider meet its strategic business goals of providing excellent service.

## Results

Al J. Schneider currently assesses the success of its wellness initiative by measuring participation rates. In 2009 over 90% of the company's associates participated in at least one of the following programs: HRA, health fair, screenings, Weight Watchers @ Work, weight-loss contests, Zumba classes, the fitness center, health publications, and health resources offered through its insurance provider. One Al J. Schneider employee who participates in Weight Watchers @ Work explained, "My family tells me that my outlook on life is more positive now as well. I can tell you this: if the hotel was not offering Weight Watchers @ Work, I wouldn't have time to pursue it in my off hours." In 2009, the company also served over 13,000 free healthy lunches in its associate cafeteria.

## Next Steps

Going forward, Al J. Schneider plans to develop additional programs that align with the corporate strategy. They also plan to continue to offer programs, incentives, and opportunities that allow associates to pursue health and wellness on and off the clock. Additionally, plans are in place to begin to quantify results by looking at health care claims reports, HRA results, participation rates, and associate interest surveys.

**"Our Wellness Team is a  
great example of how we've  
chosen to invest in our people."**

# GE Appliances & Lighting

## Using a Corporate Certification Strategy to Achieve Wellness

*HealthAhead* is a company-wide wellness initiative comprised of eight elements and a certification process that helps GE's various business segments to integrate the initiative into the company's business operations.

### Company Overview

GE Appliances & Lighting, a business segment of General Electric (GE) headquartered in Louisville, Kentucky, is a business leader in major appliance, lighting services, and systems for commercial, residential, and industrial use. GE employs 27,000 people worldwide, and the Appliances & Lighting segment has 5,000 employees in Kentucky.

### Initiative Overview

GE's wellness initiative, *HealthAhead*, is a comprehensive program aimed to improve the health of employees, retirees, and their families. Following a prescribed process, GE business segments are asked to implement the program. *HealthAhead* was initially piloted at select GE offices in October 2009 and expanded to all locations with more than 100 employees, including GE Appliances & Lighting. In order to achieve certification, GE Appliances & Lighting integrated eight elements of *HealthAhead* into its business operations. These elements are:

- 1. Site Leadership and Wellness Teams** - Name a leader, form a team, access available funding;
- 2. Education and Prevention** - Offer HealthCare 101 course, educate on a minimum of two prevention topics annually, and offer screenings;
- 3. Nutrition** - Ensure 50% of the cafeteria's food offerings are healthy, label healthy options, offer subsidized healthy options, and uphold the nutritional standards for healthy meals, entrees, snacks, and drinks set by GE in its nutrition policy;
- 4. Physical Activity** - Either provide accessible fitness options or subsidize fitness center membership;
- 5. Tobacco Cessation** - Provide smoking cessation programs in order to meet the goal of having tobacco-free campuses by November 1, 2011;

- 6. Stress Management** - Offer a minimum of three Employee Assistance Program (EAP) sessions to employees and families, provide stress management education and events, and host annual manager training that reviews the causes, signs, and effects of stress and teaches managers to reduce stress personally and for their team members;
- 7. Health Risk Questionnaire (U.S. only)** - Demonstrate communication and implement health risk questionnaire;
- 8. Health Related Absence** - Ensure that effective return to work processes are in place. These include creating a cross-functional team to help employees return safely and demonstration of awareness of absence-related metrics (i.e., days away from work).

The *HealthAhead* certification process provides a system and structure for implementing the initiative across various lines of business. Lean Materials Manager Tom Lambe believes this structure is important because it takes a "complex and somewhat ambiguous concept and makes it real for people." Program Manager of Health & Employee Communications at GE Appliances & Lighting Jeff Caywood describes *HealthAhead* as focused on "improving the health and wellness for everyone at GE, including our families."

Through *HealthAhead*, GE aims to: **(1)** have a healthy and engaged workforce, **(2)** reduce health care costs to improve the competitiveness of its business units, and **(3)** reduce absenteeism. Lambe describes the significance of having a healthy and engaged workforce, "We feel like employees' health, their exercise program, their nutrition, and all the elements play very deeply into the success of our plants and our teams."

## Snapshot

**Industry:** Manufacturing

**Number of Employees:** 27,000

**Self-Insured:** Yes

**Age of Program:** 1 year

**Headquarters:** Louisville, Kentucky

### Health-Related Awards:

- *Business First's* Greater Louisville's Healthiest Employers Finalist (5,000+ employees category) (August 2010),
- American Heart Association Platinum-Level Start! Fit-Friendly Worksite Recognition and Community Innovation Award (April 2011)

## Implementation

### Certification Process

GE established the certification process to integrate *HealthAhead* into the organization's business processes. As Caywood describes, "...making sure *HealthAhead* is always built into something that is already going on in the facility, to make it part of the regular rhythm, I think, is going to be key to us making sure it is sustainable."

To become certified, sites are responsible for meeting distinct requirements within the eight aforementioned elements and to demonstrate that it has a framework and programs in place to create a healthy worksite. Among the eight elements, 56 specific requirements are used to measure each site's progress toward achieving certification. One such requirement is substantiating that the site has an allocated budget for *HealthAhead*, though no specific amount is required. For GE, having a budget is a test of sincerity about the initiative.

Another essential element of ensuring the success of *HealthAhead* is GE's requirement that plant managers report their site's *HealthAhead* framework score to the general manager of manufacturing on a weekly basis. The framework score measures each site's progress toward implementing the basic requirements for the eight elements. The scores range from 1-100.

In order to apply for certification, a site must meet 100% of the requirements and then maintain or improve every year after certification. By adding the framework score updates onto their weekly meeting agenda, plant managers are accountable for the site's progress towards certification and for establishing plans to advance their certification score.

### Implementation at GE Appliance & Lighting

GE Appliance & Lighting became a certified *HealthAhead* location in July 2011. The team followed a variety of steps to implement *HealthAhead*. First, a site leader was chosen to spearhead the initiative. The individual chosen had a proven track record and was involved in the operations of the business. Health Care Manager Donna Stone explains that by doing this, they are "holding the operational people accountable which has further allowed this GE business unit to build the initiative into its operating rhythms."

After the site leader was chosen, a cross-functional project team was formed that focused on the implementation of *HealthAhead* throughout the year. To begin, the team developed a charter, mission, goals, and objectives to help drive the implementation process. The team used the established corporate framework as a backbone for what they wanted to accomplish. Additionally, the team created their own customized goals.

Next, the project team was divided into sub-teams that focused on each of the eight elements. For example, the nutrition team set a goal to reduce the consumption of French fries in the cafeteria by 50%. The nutrition team worked to subsidize healthy items, charging employees 20% below retail for salad bar items and ensured that combo-meal-deals included only healthy options. The team achieved both goals; the sale of French fries was cut in half and the sale of fruit and salad items doubled. The team has also calculated from cafeteria sales that greater than 50% of all cafeteria items sold are healthy.

# GE Appliances & Lighting

## Results

Because GE is in the process of establishing certification across its sites, the current evaluation metrics are related to sites' progress toward achieving certification. In addition to its certification process, GE is measuring two additional areas related to *HealthAhead*: **(1)** screening rates — GE's health plan provider informs GE of the percentage of its population that took part in a screening, and **(2)** generic medication utilization rates. Though *HealthAhead* was implemented in January 2010, GE Appliances & Lighting has seen the following increases in its screening rates: 13% for cholesterol, 6% for mammography, and 4% for colonoscopy.

It is too early to see if GE has lowered the per employee health care cost, but positive impacts of *HealthAhead* have already been experienced at GE Appliance & Lighting through increased

employee engagement. Employees are more engaged with each other by eating together in the cafeteria, walking on designated trails, and discussing *HealthAhead* activities. *HealthAhead* is not only promoting camaraderie between the employees, it also displays the company's investment in its employees.

## Next Steps

After all of GE's business units with 100 or more employees have achieved *HealthAhead* certification, the initiative will advance to the post-certification phase where GE will focus on promoting a culture of health. The post-certification phase will focus on utilization metrics to help determine if GE has a healthier population and lower per employee health care costs.

**“...making sure HealthAhead is always built into something that is already going on in the facility; to make it part of the regular rhythm, I think, is going to be key to us making sure it is sustainable.”**

INNOVATION  
AT A GLANCE

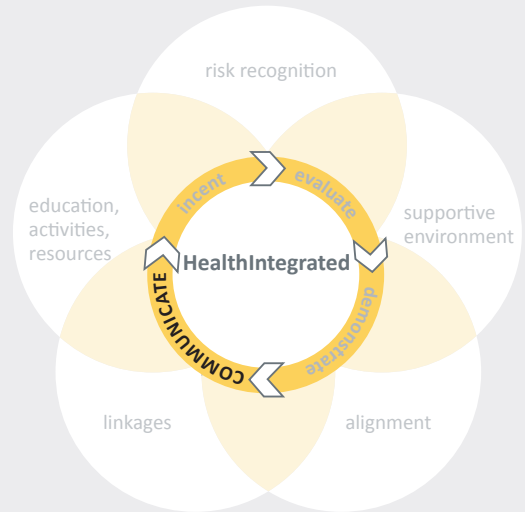
Communicate

At City of Paducah,  
Communication is Key  
to Wellness Initiative

**The City of Paducah employs a diverse workforce (from administrative office staff to police officers to city crew workers), and therefore its Wellness Program uses an array of communication strategies to promote wellness.** This emphasis on communication may seem simple, but it is extremely important for the city in helping to create successful program utilization.

Paducah uses widely-adopted communication strategies such as emails, quarterly newsletters, and posters. Additionally, recognizing that many of its employees work in the field and do not have access to email as a routine part of their day-to-day work, they utilize payroll stuffers. Something as simple and inexpensive as payroll stuffers can increase awareness and opportunities related to the wellness program.

The importance of wellness to the City of Paducah is underscored by its place on the agenda at Directors' meetings. Directors meet two times each month, and wellness topics and presentations are covered at these meetings. This integration of wellness into regular meetings demonstrates the importance of the wellness program to leaders and helps them communicate the importance to their employees.



In addition, the City of Paducah is very intentional in its communication with union leadership. Acknowledging the important role that the union plays in the lives of employees, the city has worked toward open communication with the union, thereby creating another opportunity for employees to hear important information about the wellness program.

Such formal avenues are complemented by informal dialogue and the collaborative process through which employees can shape the wellness program. For example, Adrienne Gleeson, former Human Resources and Budget Administrator reports, "We even had financial wellness in April because an employee said, 'My financial health contributes to my mental well-being and that's all about wellness too.' And we said 'you're right; let's get somebody in here who is a financial planner and talk about the implications of your financial well-being on your overall health.'" By using multiple communication outlets and fostering two-way communication, the City of Paducah ensures that its employees know the opportunities available to them and feel empowered to shape future wellness opportunities.

# Kentucky Chamber of Commerce

## Leading by Example with My Healthy Bonus

The Kentucky Chamber of Commerce advocates for improved health and wellness of Kentucky citizens, contained health care costs, and better employees overall. It has aligned its organizational practices with these strategic goals, thereby leading by example.

### Company Overview

The Kentucky Chamber of Commerce (the Kentucky Chamber) is a non-profit located in Frankfort, Kentucky. Formed in 1946, it supports the business climate in the Commonwealth of Kentucky by advocating for and providing information to its 2,700 member businesses. The Kentucky Chamber has 30 full-time employees.

### Initiative Overview

In October 2008 the Kentucky Chamber started a wellness initiative by contracting with an external vendor, KC Wellness, to formalize practices already in place and help employees to maintain and improve their personal health and well-being. Through the wellness program, employees have the opportunity to participate in challenges and wellness activities, attend seminars, read a wellness newsletter, and participate in health risk assessments (HRA). The Kentucky Chamber ensures that healthy food choices are available at all sponsored events and incentivizes participation in the wellness program by allowing employees to earn up to \$500 in “wellness dollars” per year.

The Kentucky Chamber intentionally strived for a culture shift with the organization’s leadership deciding to focus on the health and wellness of employees. Aimee Hiller, Vice President of Administration, explains, “We serve the business community. Part of our strategic plan is focused on wellness policy and on educating employers about employee wellness and the return on investment. So we felt that our external plan translated well to an internal plan for our staff.” As a small business, the Kentucky Chamber wants to model the ways in which employers can easily implement a wellness program and provide some turnkey examples for employers. By aligning external and internal strategic goals related to wellness, using wellness activities to contain cost, and focusing on culture change, the Kentucky Chamber of Commerce leads by example.

### Implementation

#### *Aligning Goals: Improving the Health of Kentucky’s Workforce*

Kentucky has its share of challenges related to health and wellness. The Kentucky Chamber knows that employer-sponsored wellness programs can help to create significant changes in the health and wellness of employees and their families. Beyond modeling best practices, the Kentucky Chamber has published a free toolkit for employers that offers a step-by-step framework for starting a wellness program. By making the toolkit available as a free downloadable PDF on its website, the chamber provides support for its members and helps to advance on of it strategic goals.

#### *Containing Costs*

The Kentucky Chamber wanted a rich wellness program, but didn’t have a large budget to work with, so it hatched an idea and proposed it to its employees. In order to fund the wellness program—and illustrate the high cost of health insurance premiums to its workforce— it asked employees to pay 10% of their premiums to fund the incentive pool. Because participation in the wellness program enabled staff to earn much of this money back, employees agreed. Hiller acknowledges that “a lot of companies wouldn’t be in the position to be able to do that. We were very fortunate. But it is a good way to fund an incentive program and it goes over well with the employees.” Once the program was funded, the chamber also wanted to determine whether it was effective at keeping health insurance costs down. The chamber receives aggregate data on HRA results, and after the third year of the program concludes, the organization will analyze the data to ascertain how the program is reducing health costs.

## Snapshot

**Industry:** Public Administration

**Number of Employees:** 30

**Self-Insured:** No

**Age of Program:** 3 years

**Headquarters:** Frankfort, Kentucky

### Change in Culture

In the first year of the wellness initiative, Hiller wanted to “ensure that everyone understood that the culture was shifting a bit” in order to gain employee buy-in. Therefore, it created a wellness committee comprised of one representative from each of its four main departments. The committee has a budget and collaborates with the chamber’s wellness vendor to organize the challenges, choose the prizes, and essentially drive the program. This ensures that the program is relevant to the needs and interests of the employees. Membership in this committee can change each year.

### Results

The Kentucky Chamber has some goals for its wellness program that are easy to quantify and some that are not. For example, in Year One of the program, it wanted 85% of employees to participate in the employer-sponsored health promotion activities and wanted to identify medical and lifestyle risk factors for 85% of employees through the participation in the HRA process. Both goals were met. Additionally, the chamber far exceeded goals related to wellness and fitness challenges. Employees who worked together on a weight-loss challenge collectively lost over 70 pounds.

One of its more elusive goals relates to its workplace culture, though the Kentucky Chamber also feels that this has been a success. According to Hiller, the focus on wellness at the Kentucky Chamber is pervasive and a part of employees’ day-to-day lives. Because the organization is small, and because employees are steeped in policy work related to health and wellness and cost containment, it was a smooth transition. This culture change has also led to a healthier workforce, and “a healthier workforce is a more efficient, effective, and affordable workforce” says Hiller.

By being more engaged, they are better able to help meet their strategic goals related to Kentucky’s overall health and wellness.

Over 2,500 Wellness Toolkits have been downloaded from the Kentucky Chamber’s website, providing evidence that Kentucky’s businesses are utilizing the resources made available by the chamber.

### Next Steps

Going forward, the Kentucky Chamber is looking to expand its wellness initiative beyond physical health and wellness and, as Hiller explained, have “more of a nod toward total wellness.” To do so, the company is exploring ways to educate its employees on topics such as financial wellness and how to decrease stress in their lives.

Additionally, the Kentucky Chamber hopes to further align its internal and external strategic plans by developing a Wellness Council — wherein Kentucky Chamber member businesses will engage in an ongoing discussion related to the well-being of Kentucky’s workforce and how they, as members of the business community, can create positive change. In addition, the chamber plans to continue health-related advocacy and policy work with member businesses.

*“A healthier workforce  
is a more efficient, effective,  
and affordable workforce.”*

# LG&E and KU Energy LLC

## Aligning Wellness with Business Objectives

LG&E and KU has aligned employee wellness with organizational and business objectives by holding managers accountable for the development and implementation of safety and wellness activities within their divisions.

### Company Overview

LG&E and KU Energy LLC (formerly E.ON U.S. LLC) is an energy services company headquartered in Louisville, Kentucky with operations throughout Kentucky, Virginia, and Tennessee. The company owns and operates Louisville Gas and Electric Company as well as Kentucky Utilities Company. LG&E and KU employs 3,139 individuals across all sites; 3,116 are based in Kentucky.

### Initiative Overview

*Choose Well*, LG&E and KU's wellness initiative, started with a 1993 smoking cessation program. Over 18 years the initiative has grown and changed. The wellness initiative is currently housed within the Corporate Health and Safety division, which speaks to the company's commitment to wellness as a core part of business practice. Employees, retirees, and spouses are eligible for program participation and currently over 8,000 health plan participants are enrolled.

Three principles are continually guiding *Choose Well*:

**(1)** fostering a culture of health and wellness, **(2)** promoting corporate, local, and individual responsibility for cost control, and **(3)** designing a wellness initiative and benefit plan to encourage health consciousness and behavior management.

*Choose Well* is a comprehensive wellness program that includes health screenings, flu shots, fitness facility reimbursements, onsite health fairs, and incentives for participation. Because of the company's size and multiple locations, LG&E and KU is keenly aware of the need for management buy-in and participation in wellness activities and events. Health and Safety Manager Barbara Hawkins underscores this point: "We really want to try to close the gap in developing a culture of health at the local departmental level." In order to close this gap, management involvement and accountability has been implemented across all sites.

### Implementation

As *Choose Well* has grown from a small smoking cessation program to a comprehensive and culture-driven wellness initiative, the oversight of the program has changed. *Choose Well*, initially spearheaded by a Wellness Task Force, was moved first to the Benefits Division and then to its current location within the corporate structure — the Corporate Health and Safety Division. This alignment with a larger and very visible division has enhanced the wellness program's visibility. To ensure that the corporate commitment to wellness is translated across the large company, measurable management performance objectives are included in all performance evaluations and the company has created a matching grant program that leverages funds for departmental/local wellness initiatives.

### Standard Management Objective

In 2010, to further the organizational culture of health, LG&E and KU included a health and safety standard management objective in every manager's annual performance evaluation. The management objective is written and agreed upon by senior leadership and is the first objective for all supervisors and their superiors.

Through the management objectives, managers are required to meet certain wellness and safety goals each year. Their performance in this area is evaluated annually. This has aligned wellness and talent management processes, creating the expectation of managers to promote wellness. Hawkins describes the effect of the objective on managers, "They are held accountable for the development and implementation of activities within their workgroup that are going to help support the health and safety of their workforce."

## Snapshot

**Industry:** Utilities

**Number of Employees:** 3,139

**Self-Insured:** Yes

**Age of Program:** 18 years

**Headquarters:** Louisville, Kentucky

### Health-Related Awards:

- *Business First's* Greater Louisville's Healthiest Employers (1,500–4,999 employees category) (August 2010)
- Greater Louisville Inc.'s Mayor's Healthy Hometown Worksite Wellness Award (2008)

### Matching Grant Program

In 2009, LG&E and KU began a matching grant program to help fund managers' development of local wellness initiatives that are aligned with *Choose Well's* guiding principles. Managers may apply for grants up to \$1,000, which are scaled according to the number of employees in a work group. Activities that meet the grant requirements include ordering pedometers to conduct walking challenges or sponsoring a team for a 5K event. Managers agree to establish goals with a description of how their work group is meeting those goals and to provide aggregate data.

### Results

In 2011, LG&E and KU has 138 managers who together have over 1,700 employees participating in grant-funded initiatives (such as "Biggest Loser" competitions between departments). LG&E and KU has worked diligently to gather data about these initiatives to showcase them in the company newsletter. "When one department sees what another is doing it stirs up competition... furthering that culture of health," observes Hawkins.

Just as *Choose Well* has evolved over time, so has the evaluation of the wellness initiative. LG&E and KU discovered the impact and savings of *Choose Well* through various evaluation methods. In 1998, the company examined the relationship between participation in the wellness initiative, sick leave, and workers compensation. They have also performed comprehensive analyses to compare health care costs for those who participated in the health fair and those who did not. Overall, LG&E and KU has seen that those who participated in *Choose Well* used 20% less sick time, spent 20% less on health care, took 22% fewer prescription medications, had 36% fewer hospitalizations, and 24% fewer emergency room visits.

### Next Steps

As evidenced through the program's growth and development, *Choose Well* is constantly evolving to ensure that it meet the needs of the company and its employees. Continued evaluation of all aspects of the wellness program will provide data that can be used to further its development. The alignment of management goals and financial support for departmental wellness events are both relatively new components of the wellness program and will be evaluated and continued.

**"When one department sees what another is doing it stirs up competition...furthering that culture of health."**

# Logan Aluminum

## Team-Driven Wellness

Logan has integrated its Benefits, Medical, and Wellness (BMW) departments to better align the goals of each. In addition, a BMW representative is included on each of its self-directed teams to ensure that wellness is integrated into its operations at a local level.

### Company Overview

Logan Aluminum Inc. (Logan) was founded in 1985 and is currently owned by ARCO Aluminum Inc., a subsidiary of BP Corporation, and Novelis Corporation. Headquartered in Russellville, Kentucky, the company manufactures aluminum for 40% of North America's beverage can production. Logan currently employs approximately 1,000 full-time employees and 100 contract employees at its western Kentucky plant.

### Initiative Overview

In 1993, Logan formalized a wellness program focused on fostering healthier lifestyles for its employees and creating a culture of health throughout the plant. This program eventually became known as *Logan Alive*. Logan aligns wellness with its corporate structure by using the company's signature self-directed teams as the primary mechanism for communicating and encouraging wellness participation. By integrating its Benefits, Medical and Wellness departments, Logan has better integrated employee health into the operations of the organization.

*Logan Alive* provides employees with many opportunities to enhance wellness. Health assessments and screenings, nurse consultations, and educational programs are regularly offered and healthy options are emphasized in the cafeteria. Because employees work in different shifts, educational offerings are staggered to accommodate shift schedules. Employees, retirees, and spouses are eligible to participate in the wellness program.

### Implementation

In 1993, Logan integrated employee health into its self-directed teams by including a wellness representative in regular team meetings. This was the beginning of a unique approach to wellness that has set the company's program apart. Since 2003, Logan's health care plan has been consumer-directed. The shift to a consumer-directed model was intended to reduce health care costs for both the company and its employees. Emphasizing wellness is essential in this model of benefits provision. Thus, in 2007, the company integrated three separate departments—Benefits, Medical, and Wellness—into a unified BMW department. All three are aligned to ensure the success of each individually and the company as a whole. Each BMW team leader is responsible for communication and the dissemination of information related to wellness to the rest of his/her team.

### Integration into Self-Directed Teams

The self-directed team concept at Logan views all employees as stakeholders and as management resources. For this reason, each month the Benefits, Medical, and Wellness Team holds BMW representative meetings to keep team leaders abreast of wellness programming, and health care costs for that month. The 1-hour to 90-minute meetings are held on the second Tuesday of every month with two different sessions, morning and afternoon, to accommodate employees working various shifts. At these meetings, representatives are updated on Logan's health care plan. Logan also communicates its monthly health care costs directly to employees through its benefits website that all employees can access. Benefits, Medical, and Wellness Leader Johnny White describes the importance of transparency and engaged stakeholders:

## Snapshot

**Industry:** Manufacturing

**Number of Employees:** Approximately 1,000

**Self-Insured:** Yes

**Age of Program:** 18 years

**Headquarters:** Russellville, Kentucky

**Health-Related Awards:**

- WELCOA Gold Status Award (2001)

*We made a conscious decision that we're going to have engaged stakeholders... We're going to give employees information—making sure that we're open—so they can truly partner with the management and make sure we do what is best for Logan...we realized a long time ago that you have to keep everyone involved and keep them engaged in all aspects of the business. And that's what we've tried to do.*

After each team meeting, BMW representatives are asked to share the information with team members with the caveat that if the representative has a particular concern or question, a member of the Benefits, Medical, and Wellness Department will come discuss it with the team. The Benefits, Medical, and Wellness Department also sends out an email after each meeting with answers to any questions or necessary follow-up from the representative meetings.

By integrating wellness into its self-directed team approach, Logan integrates wellness into its structure and culture. It also ensures a representative from each team in the plant (80 total employees) is working to encourage wellness at the team level.

## Results

Logan's objective for its wellness initiative is to be at half or below the national inflation for health care costs. The company has been able to meet this objective every year from 2003 to 2011 (except 2008 because of one catastrophic claim). Furthermore, from 2003 to 2005, Logan's health care claims remained flat.

For Logan Aluminum, the success of its program is also evidenced by the improving health of employees. Through its health risk assessment (which has a 99% participation rate) Logan compares a variety of health metrics every year including low-density lipoprotein (LDL), triglyceride levels, and body mass index (BMI). Logan also measures the decrease in tobacco users. In 2009, 13% of Logan employees improved their LDL levels; 10% improved their triglyceride levels, and many other health successes. White explains, "Our employees are becoming healthy as a result of what we're doing." By ensuring that employees understand how their behavior impacts their health care costs—and how they can change these behaviors—the company has been successful in improving overall health and wellness of employees.

## Next Steps

To further demonstrate the success of *Logan Alive*, Logan is working to develop additional methods of evaluating the program. White states, "We're trying to find out other ways that we can prove that what we're doing is making our employees healthier, which in turn will make them safer, which in turn will help keep those employees here longer."

Logan Aluminum is always looking for ways to improve upon its wellness initiative in order to improve the health and well-being of its employees. In the immediate future, the company would like to increase its retiree (and their spouses) involvement by extending eligibility for the wellness incentive to retirees in 2011.

**"We realized a long time ago that you have to keep everyone involved and keep them engaged in all aspects of the business. And that's what we've tried to do."**

# Conclusion

The primary purpose of this employer-engaged research project was twofold. First, we set out to develop a healthy organization model (HealthIntegrated) that could serve as a guide for employers interested in **(1)** creating an organizational structure and culture that supports health by recognizing its relationship with organizational performance and **(2)** understanding how integrated organizational strategies can reduce or stabilize health care and other business costs by addressing organizational factors that influence employee health. We developed this model by reviewing the scientific literature and by gathering information from employers. **The result of our research is the HealthIntegrated Model that illustrates five key organizational dimensions and the four essential business processes that ensure that health is woven into the organization.** Second, we set out to gather and highlight promising practices that reveal creative ways Kentucky employers are addressing the health of their workers. We hope that by doing so, other employers can use these examples to help infuse employee health into their own operations and culture. When possible, we've illustrated the metrics employed to demonstrate the effectiveness of these initiatives.

## Fulfilling iwin's Mission

Creating organizations where employees thrive leads to healthier families and communities. It also leads to improved organizational outcomes. When practices that promote employee well-being are shared among organizations, the resulting synergy helps to propel Kentucky to become a state-of-choice, a place where companies want to locate and where people want to live and work.

Some of the wellness programming efforts we profile in this report have been in existence in some form for almost 20 years; others are in their first year of development. Likewise, we interviewed companies that represent a variety of industries and sizes, some who contract their program to external vendors and others who keep most of the program in-house, including self-insuring their employees. The resources available to large versus small firms, or established versus new programs, are understandably different. Likewise, certain industry sectors may view employee well-being in a way that is critical to their line of business (e.g., a manufacturing firm that links employee wellness to occupational safety and health outcomes), but which may be eye-opening for employers in other sectors.

Best practices across many of the industries were revealed when organizations leveraged their unique resources and engaged employees in program development. To stimulate organizational learning, this report describes a range of diverse approaches to maintaining and improving employee health in a variety of industries and firm sizes so that employers may learn from and teach each other by example.

It is clear through the examples highlighted in this report that Kentucky employers are taking strides to address the health and well-being of their employees and we celebrate their efforts. Nonetheless, our project illuminates several opportunities for growth.

## Increased prevalence of worksite wellness initiatives, but many fall short of HealthIntegrated

Upon completion of this report, we have learned a great deal about the “state of the practice” as it relates to healthy or HealthIntegrated Organizations in the Commonwealth of Kentucky. Organizations that participated in this study are beginning to include wellness concepts into their operations and cultures and have developed, piloted and expanded a range of initiatives to promote a healthy workforce and workplace. Yet, few organizations have fully achieved a work environment where health is integrated. This is understandable as the concept of health as a part of productivity management is still relatively new in many organizations, as are health promotion programs in general. The good news is that the number of Kentucky organizations offering some form of health and wellness program has almost doubled from 34% in 2007 to 63% in 2010.<sup>37</sup> However, there is plenty of opportunity for organizations to develop their health and wellness initiatives to reap the full benefits of a HealthIntegrated workplace.

## When organizational outcomes are secondary outcomes, wellness programs may remain isolated

Many employer representatives spoke to the benefits of healthier employees related to increased productivity, but health care costs—not human capital-related goals—remain the greatest driver for wellness initiatives among the companies we interviewed. Perhaps because the other organizational benefits (e.g., increased productivity, retention, employee engagement) of healthy employees are viewed as a secondary outcome to health care costs, many wellness programs are comprised of distinct programming efforts rather than representing a shift in strategic thinking, where employee health is a business objective and integrated into the whole of the organization.

Despite this gap in strategic action, we were encouraged at the number of employer representatives we interviewed that took seriously the notion of incorporating health into their culture and business objectives. This can be an enigmatic challenge, as culture is hard to change, but many organizations understood this process as one of integration, not substitution.

Similarly, including health in a firm’s strategic business objectives is difficult because doing so necessitates new ways of thinking about accountability, management and supervisory practices, and—to some extent—personal responsibility. Many examples are given in this report of organizations that have evaluated their needs, assessed their strengths and resources, and have molded projects to the character of their employee population with promising results for employees and employers.

## Challenge of Evaluation

Employers understand many of the overarching reasons why employee health is so important, and many participating organizations can speak theoretically about the connection between employee well-being and organizational performance. However, through our research we discovered that many employers find it harder to actually quantify the bottom line impact of employee health. This problem of evaluation is on par with national trends. In one national study of Fortune 500 companies, almost every participant (97%) agreed that their senior manager was committed to health promotion, but only a third (37%) actually collected data across various systems to evaluate the impact of their health promotion programs.<sup>16</sup> Because this dollar amount has a significant bearing on funds allocated toward wellness programming—as well as the overall health of an organization and its workforce—this gap in knowledge can serve as a serious road block for building organizations where health is truly integrated.

## Next Steps

Evidence linking employee health and the reduction of chronic disease incidence to numerous organizational outcomes—such as employee engagement, organizational commitment, reduced health care costs and productivity—continues to build. As the demand for organizational models that address employee health continues to grow, iwin is poised to continue its research and employer outreach initiatives in ways that help employers navigate the process of integrating health into their operations and culture.

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## mission.

Develop and disseminate knowledge about the 21st century workplace to create environments that boost the bottom line, employee health and work-life fit.