

Strategies to Sustain Wellbeing Programming and Increase Employee Engagement

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Today's Learning Objectives

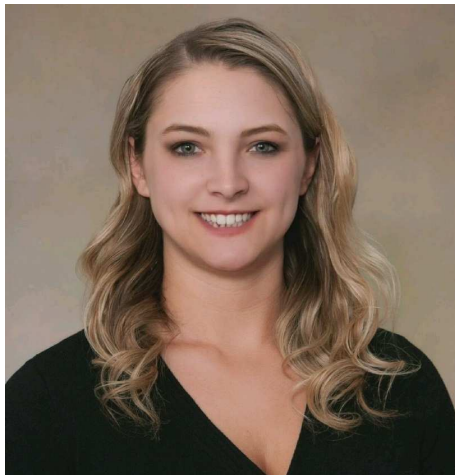


Strategies to Sustain Wellbeing Programming and Increase Employee Engagement

At the conclusion of this activity, participants will be able to:

- Identify methods to create wellbeing programming that is attractive to all employees.
- Form successful incentive strategies to drive engagement.
- Recognize the impact of continued education, support and accountability on engagement and sustainability.
- Evaluate wellness programming regularly and accurately.
- Determine an effective communication strategy.

Who am I?



- Amber Slotta
- Bachelors in Exercise Physiology
- M. Ed.
- Certified Corporate Wellness Specialist
- American College of Sports Medicine Certified Health Fitness Specialist (a.k.a. Certified Exercise Physiologist)
- Associate Professional in Human Resources (HRCI-aPHR)

Wellness Specialist for Chapman and Chapman, a Cleveland based benefits consulting firm. Manage the design, implementation and evaluation of worksite wellness programs for all clients including <50 to >2000 lives.

Wellness Programs seem great! Until....

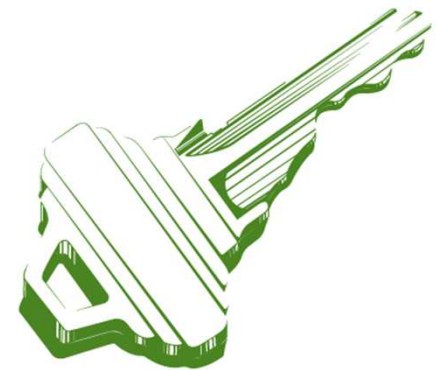


The Keys to Wellness Engagement & Sustainability



What can you do to ensure your program is engaging and sustainable?

- 1) Define & understand engagement for your population.
- 2) Assess your program.
- 3) Get support from the top down.
- 4) Design the program with interesting and engaging topics and activities.
- 5) Set a budget and stick to it.
- 6) Incentivize the program.
- 7) Recruit help in the form of wellness champions or a wellness committee.
- 8) Set clearly defined goals.
- 9) Communicate, communicate, communicate.
- 10) Evaluate the program.

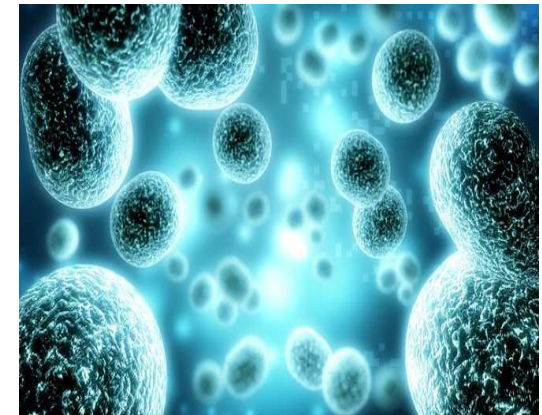


Engagement



What is 'engagement' on an individual level?

- Employees want to participate in something they perceive is a “good deal” for them. All ideas of human motivation, behavior change, and power have one thing in common; the assertion that if a person will act if they believe that acting in the desired manner will lead to a valued outcome, or “What’s in it for me?”.
- Participation in the wellness program is the most basic principle of a program that is engaging and sustainable. However, it’s unlikely to get 100% participation, or even 75%.
- Your program needs to frame participation (and continued participation) as a desired choice compared to not participating.
- There is a difference between participation in a program and engagement.



What is your organization’s definition of 'engagement'?

- Organizational engagement can realize higher employee productivity in the workplace.
- Think of employee workplace engagement in total, not just the wellness program. Employees want to work somewhere they feel supported, appreciated, have a vision and trust each other. Without this foundational level, it is unlikely employees will engage in any workplace initiative, not just wellness.

Engagement & Sustainability



Understanding Individual Motivation



Extrinsic Motivation:

- Great for starting a wellness program to help someone who was not interested in something get started.
- Example: Monetary reward for participating.
- Generally, if the reward stops, the behavior stops.

Intrinsic Motivation:

- Great for sustaining a wellness program, however, large extrinsic rewards for simple activity can lower intrinsic motivation.
- Example: Exercising because you enjoy it.
- Generally, a person will continue this behavior as the reward doesn't end.

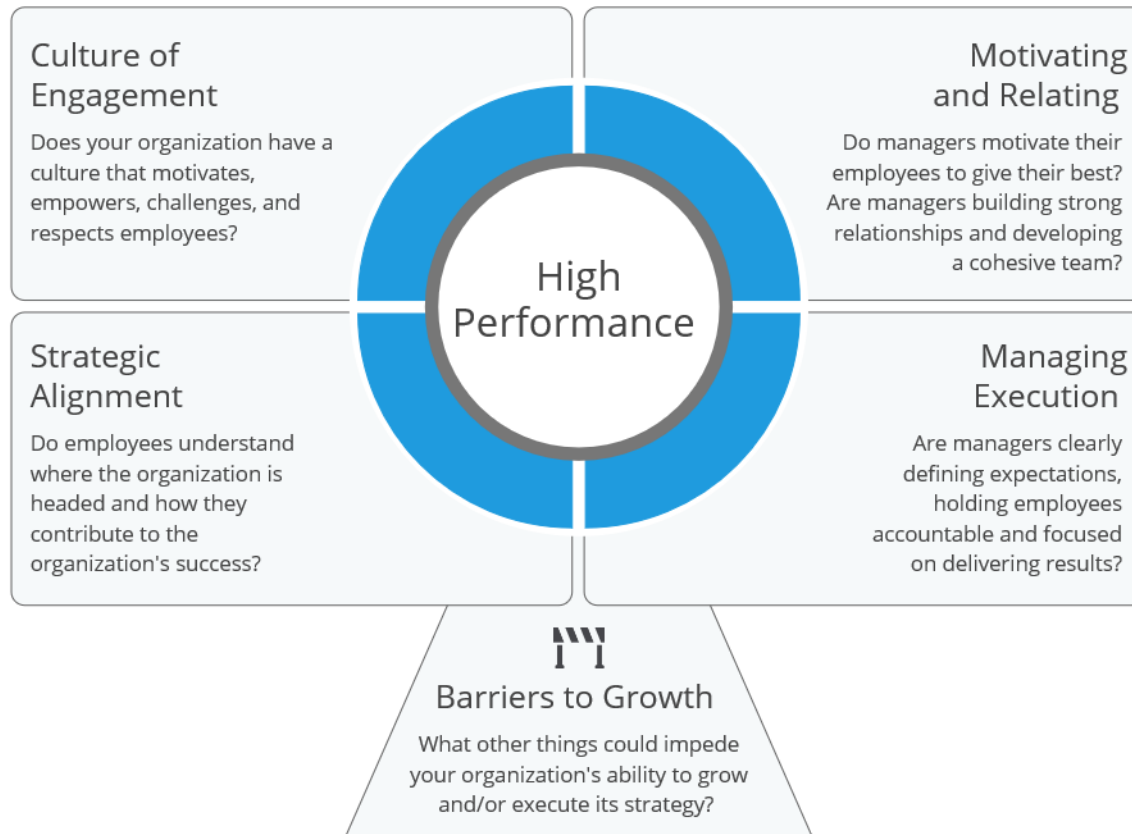
Engagement as an Organization



The two **Organization** factors deal with how employees relate to and connect with the organization.



The two **Manager** factors look at whether managers display the essential skills and behaviors needed to be effective.



Motivate Participation



Things to think about when trying to improve participation:

- Motivate behavior changes that employee's believe they can actually change.
- Motivate behavior changes that employee's want to actually change.
- Clearly explain the "What's in it for me?" reasons- both the intrinsic and extrinsic.
- Remove or limit participation barriers and make the program convenient to participate in.
- Clearly express leadership support. Have supervisors promote the program.
- Clearly describe participation expectations.
- Track and assess employee participation and progress.
- Acknowledge and celebrate 'wins', whether organizational or individual.
- If offering incentives, award them timely.

The Missing Ingredient

- Employers have a direct impact on their employee's career health.
- An employee who is happy with their job is more likely to be healthy physically and mentally compared to an employee who is unhappy in their job or unsure of their future.
- Include professional development, or re-think your approach to create a more comprehensive wellness program.
- If your goal is to attract and retain talent, this is key.



Assess the Situation



Conduct Assessments Obtaining information about the health of the workforce—and the organization's willingness to make improvements based on this information—is a critical step in developing a workforce wellness program. This information will enable you to design programs and services that are most beneficial to both the employer and the employee. Wellness programs shouldn't be the same for every organization!

- **Conduct employee surveys to evaluate the personal wellness interests and needs of employees.** Surveying employees directly helps assess the current climate as to how a program might be received and what information employees are willing to share. Surveys can be found online, through your broker, or through a vendor. Be specific when asking employee's what would interest them, but a combination of multiple choice and open ended yields the best results.
- **Conduct a health risk assessment.** Assessing the health of the workforce will help determine which programs to implement. If only 10% of your organization gets enough exercise, try focusing on physical activity. Several laws affect the use of health risk assessments, therefore, consulting with legal counsel is recommended, especially if offering a financial incentive.
- **Conduct an organizational assessment to determine which types of wellness programs to offer.** Not all programs will be well used or supported by any one organization. If your employee's are not allowed to have their cell phones on them at work, a social network walking club or online campaign may not be the best idea.
- **Review group health plan utilization rates, both medical and pharmaceutical.** This information can be obtained in aggregate from the group health insurance carrier or third-party administrator.
- **Evaluate health culture and conduct environmental audits of the workplace in general.** See the CDC's environmental assessment for help. Performing an environmental audit will provide information on the workplace culture and its impact on driving employee wellness behavior.
- **Check out the American Heart Association's Workplace Health Achievement Index to see where your organization stands!**

Assess the Situation



Once you have completed your assessment, you should understand your organizational barriers to wellness programming as well as know your organizational facilitators.

- An organizational barrier to wellness must be addressed and either overcome or worked around in order to have a successful program. For example, if you have an office that is in a bad part of town, with unsafe cracked sidewalks, poor lighting and lots of traffic...it probably isn't a good idea to have an outdoor walking contest.
- An organizational facilitator is something that you can use to your advantage. For example, you have a gym in your building or complex.
- Organizational policies can be facilitators or barriers and play a major role in employee participation in wellness programs.
- Most reported barriers: Time & Inconvenience
 - If employees are forced to use their own time to attend workplace wellness programs, attendance will be much lower than if employee's are given time for their health. Giving employees time to participate also shows the organization is invested in the health and wellness of their employees.

Ask yourself: Is this a workplace wellness program, or a wellness program that work encourages?

Obtain Management Support on All Levels



True support from management is essential to building a successful wellness program.

- As with any initiative, management buy-in is critical for funding purposes, for obtaining support throughout the organization, and for approving policies and processes related to the program. You'll want to have support in the initial stages as well as through final approval of your program.
- Management can provide additional assistance by helping link the health promotion objectives to business outcomes, thereby positioning wellness as a fundamental part of the organization creating the "Culture of Wellness".
- Remember, middle management and supervisors are just as important to get on board.
- Have management send the right message. If your CEO imposes a 50% premium increase for smokers, but is a smoker himself, it could be viewed poorly.
- Your employees will know if the owner/manager is promoting wellness because he "has" to versus that he "wants" to.

But, how do I get management on board?



Generally, the challenge in obtaining management support is communicating the potential value of a wellness program to the organization's bottom line. Addressing the three questions below may help in obtaining the required support from senior management:

- What are the organization's short- and long-term strategic priorities? You should show how wellness programs support these strategic objectives.
- What benefits can be expected from the wellness initiative, and what is the potential value of wellness promotion to the organization?
- What are the leadership styles, pressures, strengths and weaknesses of the organization's senior-level executives? These answers can help determine the method of presentation.



Design Wellness Program



Design Wellness Program Components

Employers have great latitude in designing the wellness program. There is not one standard program, as each will vary based on organizational needs and resources. The wellness program may range from a very simple program to an elaborate multi-prong program. It is important to include a variety of components that target risk behaviors and the needs and interests of the employees. Using the information from the assessments and leadership vision, decide on components.

- 1) What do your employee's want? What does leadership want? (Don't let your personal views interfere)
- 2) What are target area's?
- 3) How does it connect with a bigger picture?
- 4) How can you show employee's what they "get" from participating?
- 5) Are you catering to all employees? Including:
 - Multiple Generations
 - Different Incomes
 - Blue Collar/ White Collar
 - Employee's with families
 - Employees with varying values and priorities



Design Wellness Program



Popular Programs Include:

- Stress reduction programs
- Weight loss programs
- Smoking cessation programs
- Health risk assessments
- Health screenings
- Exercise programs and activities
- Nutrition education
- Lunch and Learns
- Financial Wellness Program
- Mental Health Programs
- Substance/Alcohol Abuse
- Employee Assistance Programs
- Charity/Giving Events
- Vaccination clinics
- Health Coaching

Design a Plan, not just Pieces



- Create a thought-out strategy for your wellness plan.
- When you design your program in short, one-off increments you make it very hard to:
 - Track the success of the program
 - Engage employees
 - Set the tone for a bigger picture
- Try to list out events or use a calendar to track the implementation of programs throughout the year.
- If you leave up to “We will get to it later”, or “let’s revisit each quarter and see what we can do”, you will often find yourself failing on executing programs.

Summary Checklist & Recommended Timeline

Phase	Timing	Activity
Phase 1: Preparation	Beginning 6 weeks before Launch	<ul style="list-style-type: none"> Put together My Life Check team Appoint employee champions Engage leadership Familiarize your team with the tool Develop communications plan and timeline Prepare communications tools Customize messages
	2-3 weeks before Launch	<ul style="list-style-type: none"> Host employee town hall to announce launch
Phase 2: Launch	Week 1: Monday (Launch Day)	<ul style="list-style-type: none"> Send first email from CEO Send sign-up logistical information Post flyers around offices
	Week 1: Tuesday	<ul style="list-style-type: none"> Make first post on company intranet, blog or newsletter
	Week 1: Wednesday	<ul style="list-style-type: none"> Host My Life Check demonstration
	Week 2: Tuesday	<ul style="list-style-type: none"> Send first reminder email from CEO
Phase 3: Follow-Up	Week 2: Wednesday	<ul style="list-style-type: none"> Make second post on company intranet, blog or newsletter
	Week 2: Thursday	<ul style="list-style-type: none"> Host follow-up My Life Check demonstration
	Week 3: Wednesday	<ul style="list-style-type: none"> Send second reminder email from managers
	Week 3: Thursday	<ul style="list-style-type: none"> Make third post on company intranet, blog or newsletter
	Week 4: Thursday	<ul style="list-style-type: none"> Send third reminder email from employee champions
	Maintenance	<ul style="list-style-type: none"> Monitor progress Solicit feedback from employees
	Weekly	<ul style="list-style-type: none"> Send participation reminders, related announcements and healthy tips
	Monthly	<ul style="list-style-type: none"> Send progress updates from CEO
Phase 4: Maintenance	Quarterly	<ul style="list-style-type: none"> Share success stories

Compliance Considerations



- Although employers do have great latitude in designing wellness programs, like with the health risk assessments discussed earlier, employers still need to consider the legal issues and compliance requirements provided by the ADA, GINA, HIPAA and the Patient Protection and Affordable Care Act (PPACA), such as:
 - The ADA prohibits employers from discriminating against individuals on the basis of disability, including an employee's access to wellness programs.
 - GINA allows employers to "request, require, or purchase genetic information" in connection with employer-provided health or genetic services only if the services "are reasonably designed to promote health or prevent disease." The ADA has reasonable design requirements as well.
 - When part of a group health plan, HIPAA mandates that individually identifiable health information collected from or created by participants in wellness programs is considered PHI and is protected by HIPAA rules.
 - The PPACA requires that programs must be reasonably designed to promote health or prevent disease. Programs must be reasonably designed to be available to all similarly situated individuals, and individuals must be given notice of the opportunity to qualify for the same rewards through other means.
 - Other laws exist that can effect your company's wellness program.
- Always discuss wellness program designs with your consultant or company legal team and consult a tax professional for financial incentives.
- Wellness vendors can be a great help in the design and management of your wellness program and can verify your program's compliance.



Establish a Budget & Follow It



Create the Budget

- Establishing a budget is a critical step in creating the wellness program. While you can have a wellness program with a \$0 budget, without funding, the program will most likely stall.
- You will also find difficulty tracking ROI without knowing what you spend!
- Leadership will often want to see a budget and reasons why this budget is appropriate. Benchmark your organization against others in the area or of similar size.
- When creating a wellness budget, organizations should include the cost of incentives, marketing and program design in the budget. Typical items in a budget would include screening vendor/other provider fees; incentives for participation; promotional materials; meeting provisions; pedometers/fitness trackers; HR representative and committee member time, etc.

Additionally, employers may want to consider taking the following steps to look for hidden funding resources.

- Conduct surveys to determine if employees would be willing to pay for an aspect of the wellness program such as yoga or exercise classes. Gym membership reimbursement or subsidies are very popular.
- Partner with the health insurance carrier to determine wellness components offered by the insurance carrier. Often these program costs are already included in the health insurance premiums.
- Research the option of participating in clinical studies from universities or hospitals studying the impact of workplace wellness programs.
- Research local community resources or programs to supplement the wellness program.
- Consider implementing low- or no-cost community to internal activities such as a lunch walking group or a partnership with the local recreation center.
- Research grants, like the Ohio BWC grant for new wellness programs.

Incentives



Select Wellness Program Incentives or Rewards

- Incentives or rewards are an effective tool to change unhealthy behaviors, to adhere to healthy behaviors, to increase participation rates or to help individuals complete a program. The argument for rewarding employees for participating in a wellness program pulls from the basic principles of behavioral psychology: People are driven to act by the positive consequences they expect from their actions. Building a rewards system into a wellness program is a great motivator. Rewards can take many forms, including points that can be exchanged for goods, gifts celebrating accomplishments or monetary awards. Over time, the motivation for rewards shifts from an extrinsic incentive to intrinsic reinforcement (we touched on this earlier).
- Effective incentives will be commensurate with the effort required to practice the desired behavior. For example, incentives attached to smoking cessation or weight loss should be greater than incentives for participating in a lunch-and-learn seminar.
- Federal and state regulations may limit incentives, so employers should keep up to date on applicable compliance obligations.

What's in it for me?



Incentives



Value of Incentives with Estimated Participation

INCENTIVE TYPE	ANTICIPATED VALUE	EXPECTED PARTICIPATION
Premium reductions	High (same benefit for all, not based on health plan utilization)	>80%
Copay/deductible changes	Medium (only attracts those with claims who will use it)	50%-65%
Health account contribution (health savings account, HRA, flexible spending arrangement)	Medium (only attracts those with claims who will use it)	40%-60%
Cash bonuses or gift cards	Low-medium (one-time offering and not significant)	20%-30%
Paid time off or work perk	Low-medium (may work better in some organizations)	<25%
Tangible gifts	Low (not enough value to drive participation/change)	10%-20%

Note: Compliance regulations surrounding incentives are currently changing.

Dedicated Wellness Staff



Establish Wellness Staff/Wellness Committee/Wellness Champions

- List out in job duties who is responsible for wellness programs. Volunteers often do not prioritize wellness. Try to have at least one person who's job includes administering wellness programs.
- Wellness Committees/Champions can be great to help execute wellness events and promote events, as well as spread the message of wellness to their peers. They can help by:
 - Evaluating the current programs, services and policies that are available in the workplace.
 - Assessing employee needs and preferences.
 - Developing a health promotion operating plan, including a vision statement, goals and objectives.
 - Assisting in implementing, monitoring and evaluating wellness activities.
 - Employers should solicit committee members by invitation or ask for volunteers, ensuring there is cross-sectional representation, such as members from the top management, the HR department, information technology, communications/marketing, and the health and safety department; union representatives; and employees interested in health and wellness.
- Employers may want to address these additional considerations for the wellness committee, such as:
 - Determine in advance how long wellness committee members will serve and how new members will be selected. Employers may want to alternate committee members annually to avoid burnout and to obtain new perspectives.
 - Select committee members who can best represent their peers, motivate others and support the implementation of the wellness program. Employers may want to obtain the support of committee members' supervisors in providing each committee member time to devote to the committee activities.
- Part-time wellness staff can be effective, depending on the size of your program.

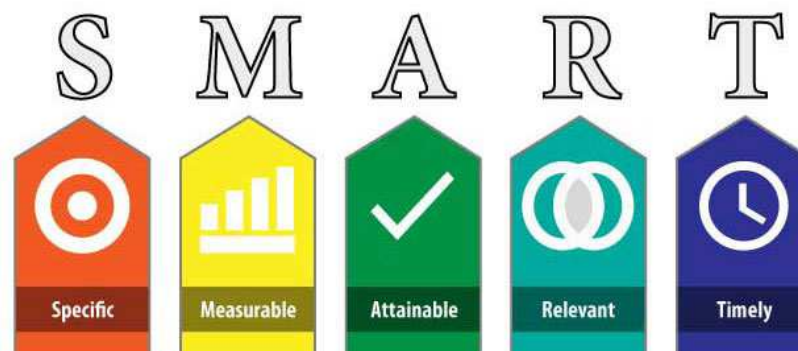
Goal Set



Develop Goals and Objectives

- Using the information gathered from the workforce assessment, employers can establish goals and objectives for the program.
- For many organizations, a key goal is to improve workers' health and thereby reduce health care costs. However, be sure to review other goals like reducing absenteeism, boosting worker productivity and increasing retention.
- Wellness program goals and objectives are both broad, long-term accomplishments expected from the program as well as shorter term, smaller goals. Objectives should be clear, time-limited and stated in such a way that it is easy to determine whether they have been achieved.

Goals & objectives should follow the SMART rule:



Goal Set



- Below are examples of SMART goals.
 - Reduce the number of employees who smoke by 5 percent in fiscal year 20XX.
 - Increase employee retention rate from XX% to XX% by 20XX.
 - Decrease the number of employees identified as obese by 5 percent in 20XX.
 - Increase the level of medication adherence of the employee population by 10 percent.
 - Increase yearly employee preventive care visits from XX% to 75% in 20XX.
 - Increase employee satisfaction levels from XX% to XX% in 20XX.
- NOT: “Company ABC would really like to concentrate on wellness this year.”
- Setting the goal of reducing healthcare spending is an option, but requires a lot of analysis and strategic program implementation as well as someone skilled enough to factor out market trend.
- You can hope your costs are reduced by “low hanging fruit” programs, but programs that hold employee’s accountable for their health financially or award incentives based on premiums will often have an easier time measuring financial success or lack thereof. Cost reduction is usually a year 3+ goal.

“We need a wellness program with high, close to guaranteed ROI, shown in 1 year, but we don’t want to put a lot of money into it and our HR department doesn’t really have the time to manage it. What do you have for us?”

Communicate Constantly



Step 8: Communicate the Wellness Plan

- The next step is to write and communicate the organization's wellness policy. This policy statement should include the organization's intent, level of involvement, and rewards and incentives system with respect to employee wellness. In communicating the reward system to employees, presenting a John Doe example may help them see the program in real-life terms.
- Communication is important to marketing the program and ensuring participation. It is helpful to use communication to create a social culture where being healthy is valued. This can be done in many ways, using well-established techniques of marketing and changing behavior, such as the following:
 - An attention-generating program rollout.
 - A wellness program logo and slogans for various components of the program, such as "Every Body Walk Now," "Wellness Wednesday," "Recess" or "Time Out for Tai Chi."
 - Visible endorsement and participation by upper management.
 - Wellness education based on sound research.
 - Persuasion of employees based on anecdotal situations.
 - Sustaining the message and the program over several years.
 - Multiple avenues of communication, such as e-mail, fliers and presentations.
 - Repetition of the message.
 - Keeping the message fresh with new information.
 - Ongoing communication and marketing are important for maintaining engagement in the wellness program.
 - Be honest and transparent.



Evaluate-Did you meet your goals?



Evaluate the Success of the Program

- As with any investment or project, evaluating the effectiveness of the wellness program is important in sustaining management and employee support and in revising or implementing new programs. Employers should have established metrics and baselines at the rollout of any wellness initiative, which will vary depending on the programs implemented.
 - Did you meet your goal? If not, where did you end up?
 - Is there something that effected your goals?
 - What can you change to improve for next year?
 - Were there unintended consequences you had not thought of?
 - What parts of the program worked?
- There are many different ways to measure success; for example, employers may measure participation rates, program completion rates, reduction in health care costs and percentage of employees who stopped smoking or lost weight-or even employee satisfaction.

The, go back to the beginning!



The Keys to Wellness Engagement & Sustainability



What can you do to ensure your program is engaging and sustainable?

- 1) Define & understand engagement for your population
- 2) Assess your program.
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- 4) Design the program with interesting and engaging topics and activities.
- 5) Set a budget and stick to it.
- 6) Incentivize the program.
- 7) Recruit help in the form of wellness champions or a wellness committee.
- 8) Set clearly defined goals.
- 9) Communicate, communicate, communicate.
- 10) Evaluate the program.



Post evaluation, re-ass your organizations needs and design a program for next year!

Questions?



*Thanks For
Watching*

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