



# WELCOA CHECKLIST

THE CURRENT STATUS OF YOUR ORGANIZATIONAL WELLNESS INITIATIVES

## **Executive Summary**

At the Wellness Councils of America, we believe that worksite wellness programs have the power to change lives and transform organizations. And, for over a decade now, we have been helping organizations of all kinds to build world-class wellness programs-the kind of programs that both enhance employee health and well-being and also contribute to organizational outcomes.

### **The Quest To Become One of America's Healthiest Companies**

The cornerstone of the Wellness Councils of America is the "Well Workplace" Awards process. This prestigious initiative recognizes quality and excellence in worksite health promotion. Driven by a rigid set of criteria, organizations of all kinds compete to be recognized as one of America's Healthiest Companies.

### **Thank You For Completing The Well Workplace Checklist**

That's where the Well Workplace Checklist comes in-it's the first step in assessing the quality and comprehensiveness of your organizations wellness initiative. Indeed, by completing the 100+ questions, you have already taken important action in better understanding where your program excels and where it needs work.

### **The Seven Benchmarks Of Workplace Wellness Success**

On the following pages you will find an in-depth report that provides you with section scores and itemized feedback on each of the seven important benchmarks that are characteristic of results-oriented programs.

1. Capturing Senior Level Support
2. Creating Cohesive Wellness Teams
3. Collecting Data To Drive A Results-Oriented Wellness Initiative
4. Crafting An Annual Operating Plan
5. Creating A Supportive Health Promoting Environment
6. Choosing Appropriate Interventions
7. Carefully Evaluating Program Outcomes

### **The Well Workplace Checklist...Your First Step In The Well Workplace Process**

Again, by completing this online Checklist <<http://www.welcoa.org/checklist/>>, you have taken an important step toward assessing the quality and comprehensiveness of your organization's wellness initiative. It is important to understand that completing the Checklist is only the first step in significantly improving and upgrading your program.

### **The Road Ahead**

Once you have read and analyzed the feedback contained in this report, we would encourage you to log on to [www.welcoa.org](http://www.welcoa.org) to learn more about the process of building a results-oriented program and perhaps even completing an application to compete for the Bronze, Silver, Gold or Platinum Well Workplace Award for your organization.

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YOUR RESULTS FOR BENCHMARK #1

# CAPTURING CEO SUPPORT

## **Benchmark #1: Capturing CEO Support**

The first benchmark of a results-oriented wellness program is strong senior level leadership. Indeed, it has been our experience at the Wellness Councils of America that when the CEO gets behind the wellness initiative things begin to change.

From the information that you provided when you completed the Well Workplace Checklist your overall rating for senior level leadership support, the first of the seven benchmarks, is:

### **Your Score: 68**

In the pages that follow, you will learn more about how we arrived at this rating. To give you a bit of brief foreshadowing, we at the Wellness Councils of America believe that there are four characteristics that help to measure CEO support. These four characteristics include: 1.) your CEO's communication practices regarding wellness; 2.) your CEO's resource allocation practices; 3.) your CEO's delegation practices; and 4.) your CEO's personal health promotion practices. Your overall rating was derived from your answers that addressed each of these four characteristics.

To learn more about your rating concerning senior level leadership, please review the information provided in this section of the report.

### **ABOUT WELCOA**

WELCOA was founded in 1987 as a national non-profit membership organization dedicated to promoting healthier life styles for all Americans, especially through worksite health promotion initiatives.

WELCOA focuses on building Well Workplaces - organizations that are dedicated to the health of their employees. The Well Workplace process provides business leaders and members with a structure or blue print to help their organizations build results-oriented wellness programs. Ultimately these programs help employees make better lifestyle choices, and positively impact the organization's bottom line.

## Senior Level Support Subsection 1: Our CEO's Communication Practices Regarding Wellness

One characteristic of exemplary senior level support is communication.

From a purely generic perspective, it is not difficult to understand why effective communication is a requirement for any leader who wishes to get things done. Without clear and regular communication from the organization's leader, people at all levels will struggle with what's important and what's a priority. This has certainly been the case with many wellness programs in all types of organizations throughout the United States. In fact, many organizations claim that wellness programs are "priority one," however their CEOs and senior level executives are virtually silent when it comes to communicating the importance of protecting and enhancing the health and well being of all people (and their families) throughout the organization.

Plain and simple, from our experience over the last 10 years in helping companies to build results-oriented wellness programs, one thing is for sure, CEOs who communicate the wellness message clearly and frequently have more effective wellness initiatives.

When it comes to effective communication on behalf of your CEO regarding your organization's wellness initiative, it is important to understand that there are four distinct levels of communication. The first is written correspondence. The second is CEO public addresses and presentations. The third way CEO's communicate wellness is by making it a part of the company's overall strategic plan. Perhaps the highest form of CEO communication is incorporating wellness and health management into the vision/mission of the company.

An excellent example of strong CEO communication is Steve Martin of BlueCross BlueShield of Nebraska. To advance wellness throughout his organization of 1,000 employees, Steve communicates with written messages and has delivered numerous wellness presentations at "all employee" meetings. Most notably, Mr. Martin has incorporated wellness metrics into the company's Balanced Scorecard, as well as made it a part of the company's overall vision/mission statement.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for CEO communication of wellness initiatives is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you work with your CEO to develop written communications promoting the overall concept of wellness. In addition, you should provide assistance to your CEO in developing a signature presentation that he/she can deliver to all employees. It may be too big of leap to incorporate wellness into the organization's overall strategic plan or make wellness a part of the vision/mission statement of the organization, but it is something you should aspire to accomplish in the future.

## Senior Level Support Subsection 2: Our CEO's Resource Allocation Practices Regarding Wellness

The second characteristic of exemplary senior level support for wellness is resource allocation.

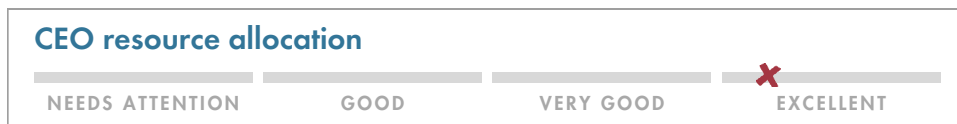
For years, many business leaders and health experts have wrongly suggested that wellness programs ought not to cost any money or should require little resources up front. However, we now know from numerous studies that, in order to be effective, wellness initiatives do require a more substantial investment in order to improve employee health and ultimately contain modifiable health care costs within an organization. According to Dr. Ron Goetzel, a world-class expert on ROI, the ideal investment for an organizational wellness initiative is somewhere in the neighborhood of \$100 - \$150 per eligible employee per year. From an investment perspective, it is realistic to think that if you invest this amount you should return approximately \$3:1 to \$16:1 according to the health management literature.

From a leadership perspective, it has been our experience that exemplary champions of worksite wellness programs will work hard to free up the resources necessary to keep employees healthy and productive.

In terms of resource allocation, it is important to understand that there are four areas that the CEO must consider funding. These include staffing, programming, space, and time--keep in mind that each of these areas has a distinct dollar value associated with it.

A CEO who has taken resource allocation very seriously is Ted Townsend of Townsend Engineering. For years, Mr. Townsend has made the case that if employees are to be healthy and productive, it is important to make sure that they have the opportunities available to them in order to accomplish this important goal. With that in mind, Ted has made available staff to lead the program, set aside generous amounts of space for wellness initiatives, funded results-oriented programs that bring about change, and eliminated barriers that keep people from participating. For this reason, Ted Townsend is one of the leading CEOs in the area of health and productivity.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for CEO resource allocation is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you work with your CEO and senior level executives to help them understand the ideal level of investment necessary in order to bring about change. In addition, we would encourage you to begin identifying potential investment opportunities in the areas of staffing, space, time, and programming. Please understand, for many organizations, this investment is not possible from the outset. However, it is our recommendation that you start with an investment that is comfortable for your organization and consistently work toward reaching the \$100 - \$150 mark.

## Senior Level Support Subsection 3: Our CEO's Delegation Practices Regarding Wellness

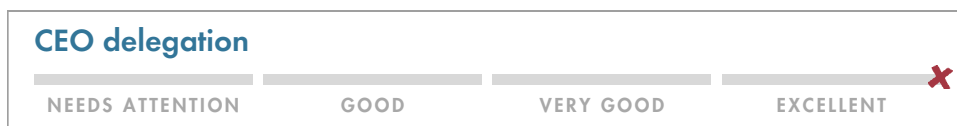
The third characteristic of exemplary senior level support for wellness is delegation.

Delegating responsibilities for wellness on behalf of the CEO is vitally important to any results-oriented wellness initiative. In fact, the more people who have been delegated formal responsibilities for the organization's wellness initiative, the more likely it is to succeed over time--and the more likely it is to become part of the organization's culture.

Delegation can take place in a variety of ways. First, and most common, the CEO can encourage the formation of a volunteer wellness committee. This is an excellent "first step," however, volunteer initiatives often lose their luster when the schedule gets hectic or the organization falls on hard times. For this reason, formally delegating responsibilities is much preferred. The second way the CEO can delegate is to appoint a wellness team consisting of senior level executives. This is an excellent move as decision makers now have a vested interest in wellness. However, unless middle management and front line employees are involved, the wellness initiative can be perceived as "strong-arming" from the top. Therefore, the third and fourth ways to delegate responsibility is to include middle managers and front line employees. It has been our experience that when the CEO delegates to senior level executives, middle managers, and front line employees, wellness committees become very effective.

Many CEOs have begun to delegate responsibilities for wellness throughout the organization's hierarchy. For example, Marc LeBaron, CEO of Lincoln Plating has made sure to involve all levels of his organization in planning and delivering wellness programs. For their efforts, Lincoln Plating has received WELCOA's Platinum Award--the highest award given for worksite wellness.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for CEO delegation is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you continue to nurture your team members on a regular basis. Also be sure to monitor the team's composition so that all levels of the organization will be represented within this entity. And, be sure to keep your CEO current with respect to delegating responsibilities to new team members. Congratulations on developing an exemplary wellness team.

## Senior Level Support Subsection 4: Our CEO's Health Promotion Practices Regarding Wellness

The fourth characteristic of exemplary senior level support for wellness is role modeling.

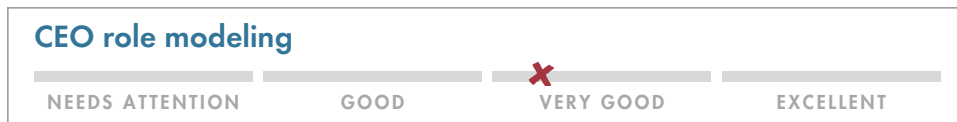
In order for any organizational change initiative to be effective, there has to be a champion. And when it comes to organizational wellness initiatives, that champion should be the CEO. In fact, when CEOs value healthy lifestyles and openly practice good health habits, the rest of the organization is likely to follow in their footsteps.

For many years, CEOs attempted to preach good health to others but not practice it themselves. We found that this was a recipe for certain and stinging criticism. Bottom line: in order to be genuine in promoting health, CEOs need to embrace health as an individual priority. This does not mean that the CEO has to be a marathoner or a "health Nazi," it just means that they value health and well being and take steps to protect it.

From our perspective, there are four elements of strong CEO role modeling. These elements include participating in an annual health risk appraisal, receiving an annual physical, regularly participating in company wellness offerings, and taking part in community wellness activities.

One CEO who has taken role modeling to heart is J. Barry Griswell, Chairman, President, and CEO of The Principal Financial Group. In fact, as a result of taking personal health seriously, Barry was able to reduce his weight from 297 to 246 pounds (Barry is 6'9"), reduce his LDL cholesterol from 131 to 104, and raise his HDL cholesterol from 47 to 66. As a result of his leadership, employees from The Principal Financial Group were able to follow in his steps.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for CEO role modeling is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you focus on the four areas listed here to develop a comprehensive role modeling plan--be sure to get all four elements in place. First, work with your CEO to introduce them to the power of role modeling. Second, consider developing a wellness initiative for your CEO. This will help them to develop a personal health plan. Third, once your leader is on the road to practicing good health habits, you'll want to make sure that they take part in the company's wellness offerings. Fourth, get your CEO involved in community health and wellness activities. Not only will it be inspiring to your employees, but it will also raise the profile of the company exponentially.



YOUR RESULTS FOR BENCHMARK #2

# WELLNESS TEAMS

 **Benchmark #2:  
Creating A Cohesive Wellness Team**

The second benchmark of a results-oriented wellness program is the creation and integration of a well-functioning team.

The reason for teams is clear. Indeed, history is replete with stories of companies whose programs have failed because they have appointed full responsibility for the initiative to one individual. While it might appear to make sense from a cursory review, placing the responsibility for the organization's wellness initiative in one person's hands is a big mistake.

Here's why.

When person in charge of the wellness program burns out, gets promoted, or takes a new job, everything that was associated with your wellness program just walked out the door. As a result, the wellness program gets put on hold until someone new gets hired or worse yet, goes away altogether.

Are we saying that hiring a full-time person is wrong? Absolutely not, in fact, it's ideal. However, we are saying that not involving other key members of the organization in the wellness initiative can be the kiss of death.

In addition to the importance of diversifying the roles and responsibilities of the wellness team, the guidelines by which these key members adhere to are equally as important.

From the information that you provided when you completed the Well Workplace Checklist your overall rating for wellness team cohesion, the second of the seven benchmarks, is:

## **Your Score: 72**

In the pages that follow, you will learn more about how we arrived at this rating. To give you a bit of brief foreshadowing, we at the Wellness Councils of America believe that there are two main characteristics that help to create a cohesive wellness team. These two characteristics include: 1.) your wellness team's history and composition and 2.) your wellness team's method of operation. Your overall rating was derived from your answers that addressed each of these two characteristics.

To learn more about your rating concerning your wellness team, please review the information provided in this section of the report.

## Wellness Team Subsection 1: Our Wellness Team's History and Composition

The first characteristic of a successful wellness team is a strong history and proper composition of team members.

Wellness teams are important because it is the people on these teams that actually get things done. When it comes to an organization's wellness team, we at the Wellness Councils of America believe that there are four elements associated with measuring the stability and composition of an effective group. These include: the overall length of time that the team has been in place; the number of members serving on the wellness team; the areas that team members represent; and the length of term or appointment for each member.

An excellent example of a strong wellness team is the one assembled by Greater Omaha Packing Co. Inc. This Midwestern-based company has developed a nationally recognized wellness initiative--and its team is the heart and soul of the endeavor. With representation from the executive ranks all the way to front line employees, this team has a long history of working together and the diversity of the team has resulted in a wellness program that has endured over the years and achieved great things.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for your wellness team's history and composition is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you focus on the four areas listed here to develop a cohesive and properly represented wellness team--be sure to get all four elements in place. First, expend effort to keep your wellness team together. From our experience, the longer your wellness team is in place, the greater the likelihood of institutionalizing the wellness program. Unfortunately, many companies neglect their wellness teams and consequently have to re-establish them every two to three years--don't let your team fall apart. Second, increase the number of people serving on your wellness team. An ideal size team is anywhere from 9-15 members. However, if you're a smaller company, a smaller team may have to suffice--believe it or not, it's not unusual to have large wellness teams even in small companies. Third, expand your representation to include input from areas like Human Resources, Benefits, Occupational Health, Communications, Safety, IT, and Finance. Even better, is the inclusion of your health care and insurance providers from the outside world. Fourth, appoint team members to specific terms--a two year term is good but a three to five year term may be even better.

## Wellness Team Subsection 2: Our Wellness Team's Method of Operating

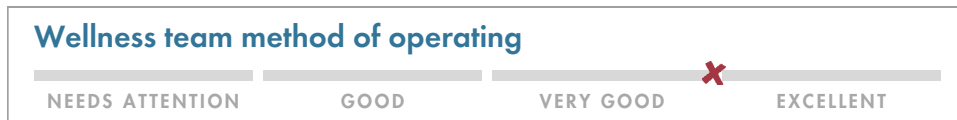
The second characteristic of a successful wellness team is the actual method of how the wellness team operates.

As with any effective team, it is important to make sure that the right people are at the table, but it is equally important to make sure that the right people are doing the right things. This is the essence of this second characteristic.

Like the first characteristic, there are four elements that can be used in determining how effectively an organization's wellness team is functioning. The first is the presence of team leadership. The second is the actual responsibilities that the team is charged with. The third is the frequency in which the team meets. And the fourth is whether or not the team has a regular agenda to which it adheres.

An excellent example of great teamwork--the right people doing the right things--is Lab Safety Supply, Inc. Located in Janesville, WI, this Platinum award winning company has developed a superior team functioning under the leadership of people like Jan Bruss and Tim Markus. With 770 employees, this wellness team has developed concrete approaches that have resulted in health improvement for employees and cost containment for the organization.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for your method of operating is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you focus on the four areas listed here to develop a team that operates with the right people who do the right things--be sure to get all four elements in place. First, appoint a team leader. It would be ideal if this team leader has a background in health promotion and answers directly to a senior level executive. Second, expand the responsibilities of the team to include data collection, planning, high risk and low risk programming, environmental modifications, and monitoring outcomes. Third, ensure that your team meets at least six times per year--monthly would be even better. And fourth, make sure that your team has a preplanned agenda each and every time the team gets together.

YOUR RESULTS FOR BENCHMARK #3

## COLLECTING DATA



## **Benchmark #3: Collecting Data To Drive A Results-Oriented Wellness Initiative**

The third benchmark of a results-oriented wellness program is the collection of data.

Data collection may very well be the most important benchmark in the entire Well Workplace process. From our perspective, many companies are just beginning to wrestle with the idea of collecting the right kinds of data and creating databases by which this information can be analyzed and monitored. Although collecting data can be a cumbersome challenge, it will get much easier in the future as health systems, insurance companies, and other health promotion providers will be routinely offering these services.

For now, it is important--indeed essential--that if you are interested in creating a wellness program that has the capability of containing costs and improving employee health, data needs to be an integrated component.

There are four subsections of this benchmark. These subsections include: 1.) organizational data which includes things like modifiable health care claims and demographics; 2.) employee health data which includes things like health risk appraisal information and health screening data; 3.) physical environment data which includes things like workstation ergonomics, cafeteria set up, and heating/ventilation; and 4.) employee protection and productivity data which includes things like absenteeism, disability, and workers' compensation data.

When taken together, these four data collection components become very powerful in providing you with objective data by which rational and strategic decisions can be made.

From the information that you provided when you completed the Well Workplace Checklist your overall rating for data collection, the third of the seven benchmarks, is:

### **Your Score: 73**

In the pages that follow, you will learn more about how we arrived at this rating. To give you a bit of brief foreshadowing, we at the Wellness Councils of America believe that there are four main components that help to drive data collection efforts. As mentioned above, these four components include: 1.) organizational data; 2.) employee health data; 3.) physical environment data; and 4.) employee protection and productivity data. Your overall rating was derived from your answers that addressed each of these four components.

To learn more about your rating concerning your data collection efforts, please review the information provided in this section of the report.

## Data Collection Subsection 1: Our Organizational Data Collection Efforts

The first component of successful wellness data collection pertains to your organization as a whole.

Specifically, if you are charged with creating a results-oriented wellness program, it is essential to collect health promotion data as it relates to your organization. By collecting this important information you will gain an entirely new and objective perspective as to how "healthy" your company really is.

There are four types of organizational data that should be collected every 12 to 24 months. The first analysis that should be done is a review of the organization's demographics. In fact, much can be learned by simply analyzing the population demographics of your workforce. The second analysis that should be done is a modifiable medical claims analysis. This analysis will allow you to pinpoint the amount of "preventable" health care dollars your organization is spending each year. The third analysis that should be completed is a corporate health culture audit. This analysis will allow you to obtain a better perspective as to what the health norms and values are within your organization. The final analysis that should be completed is an examination of employee productivity/presenteeism/engagement. This analysis will allow you to understand specifically how much your organization is losing in terms of poor productivity or unhappy people.

An excellent example of a company that routinely collects this type of data is Union Pacific Railroad located in Omaha, NE. This organization, consisting of more than 45,000 employees, makes it a point to gather and analyze this type of data. As a result of these practices, Union Pacific Railroad has perhaps the most data driven program in the country.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for organizational data collection is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you concentrate on collecting all four types of organizational data. By gathering these types of data your wellness initiative will become data driven. Indeed, you will have concrete information in front each of your wellness team members as well as data that can be shared with senior level executives. Certainly, it takes resources and significant commitment to collect these types of data every 12 to 24 months, however, the payoffs will be substantial. In fact, you will be able to create a data dashboard that can be monitored longitudinally over time. This is important for any company, large or small, that is interested in creating a results-oriented wellness program.

## Data Collection Subsection 2: Our Employee Data Collection Efforts

The second component of successful wellness data collection pertains to your employee population.

When combined with your organizational data, information on the health practices, knowledge, interests, and status of your employee population can be very powerful. By collecting this type of data, you will begin an important process of keeping your finger on the pulse of the health and well being of your employee population as a whole.

With respect to your employee population, there are four types of data that should be collected. The first is a health interest survey. This survey can be a simple, one-paged instrument that allows you to better gauge what types of programs your employees are interested in. The second type of data that should be collected is a health risk appraisal. By offering an HRA, you can gather population health data as well as provide your employees with information on their health status. The third type of data that can be collected is health screening information (e.g. blood pressure, cholesterol, etc.) and can be gathered at employee health fairs. The fourth and final type of data that can be collected is health knowledge. This can be very useful as it allows you to understand how much your employee population knows about their well being.

These four types of employee health data should be collected every 12 to 24 months. In addition, data can be collected on spouses and retirees as well.

An excellent example of a company that collects this type of employee data is Nebraska Health System. This organization consistently monitors this type of information at regular intervals. For their efforts, NHS has received WELCOA's Platinum award for excellence in health promotion programming.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for employee data collection is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you continue gathering these types of data. From our perspective, your organization has made significant inroads in the employee health data collection area and your employee health data collection practices are consistent with some of the healthiest companies in America. To keep your program at this level of excellence it is important that you continue to collect and monitor this type of data--congratulations.



## Data Collection Subsection 3: Our Environmental Data Collection Efforts

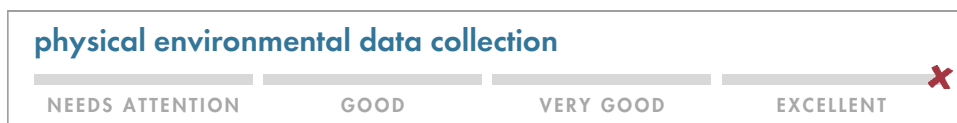
The third component of successful wellness data collection pertains to your organization's physical environment.

According to recent health research, the organization's physical environment can have a powerful influence on employee health status. With this in mind, the goal of this type of data collection is to better understand how "healthy" your physical environment is and what will ultimately need to be done to improve and/or maintain it.

There are four environmental components of your organization that should be analyzed. The first has to do with individual workstations. It is important to analyze the work that your employees are engaged in and if it is ergonomically protected. Second, a facility assessment that analyzes heating and cooling, ventilation, safety, and lighting should also be conducted. The third analysis that needs to be completed is a review of your present benefit plan. Although this particular analysis does not look at the physical environment per se, it does look at a component (i.e., the benefit plan) that will greatly impact how your employees interact with the environment. The fourth component of your organization's physical environment that should be analyzed is the cafeteria, vending machines, and/or physical activity centers.

An excellent example of a company that collects this type of physical environment data is ConAgra Foods. This Fortune 500 Company has developed exemplary physical environments for their employees. From carefully thought out cafeterias to comfortable physical spaces, ConAgra Foods is a leader in the arena of "healthy" physical environments.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for physical environmental data collection is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you continue gathering these types of physical environmental data. From the information that you provided in the Well Workplace Checklist, it is evident that your organization is committed to analyzing your physical working environment. Your data collection practices in this area are consistent with some of the healthiest companies in America. Congratulations.

## Data Collection Subsection 4: Our Employee Protection Data Collection Efforts

The fourth component of successful wellness data collection pertains to the gathering of employee protection and productivity data.

There are four types of data that should be collected with respect to employee protection and productivity. First, an analysis of employee absenteeism records is recommended. Second, the organization should conduct an analysis of disability claims that were incurred in the previous 12 to 24 to 36 months. Third, the organization should collect and analyze data pertaining to injuries and accidents that occurred at the worksite. Finally, the organization should look at workers' compensation claims.

Although many organizations have chosen not to analyze this type of data, it has been our experience that more and more employers are interested in learning more and monitoring these important areas. With this in mind, it is suggested that organizations collect and monitor this data within a 12 to 24 to 36 month timeframe.

One organization that has excelled in this area is Gallup. This world-class organization monitors employee engagement information and then extrapolates the findings to address absenteeism, employee health and other important productivity indicators. In fact, Gallup has written extensively about its findings concerning the benefits of employee engagement.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for employee protection and productivity data collection is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you concentrate on collecting all four types of employee protection and productivity data. By gathering these types of data your wellness initiative will become more in tune with your organization's productivity and related costs associated with absenteeism and injured and/or disabled employees. To be ultimately in step with the cadre of America's healthiest companies, this information should be collected every 12 to 24 to 36 months. If your organization does not have access to this type of data or is not presently monitoring these four areas, we would encourage you to do so.

YOUR RESULTS FOR BENCHMARK #4

# OPERATING PLAN

 **Benchmark #4:**  
**Crafting An Annual Operating Plan**

The fourth benchmark of a results-oriented wellness program is the crafting of an annual operating plan.

The operating plan is the central document that serves as the key piece of communication as to what your program will accomplish. Believe it or not, many organizations underestimate the value and utility of the wellness operating plan. Specifically, the operating plan is important for a variety of reasons. First, the operating plan will provide organizational and individual "alignment." By alignment, we mean that all of the important players will be moving in the same direction looking to accomplish unified goals. Without an operating plan, many times organizations will suffer from fragmentation as each key player will go their own way and do their own thing. Put succinctly, the operating plan keeps everybody moving in the same direction.

Secondly, the operating plan allows for organizational and individual "empowerment." Because individuals will have important tasks, responsibilities, and priorities, the operating plan will allow everyone to accomplish their specific tasks while at the same time maintaining alignment. Indeed, alignment and empowerment are the key elements that create results. Without a well-developed operating plan, you run the risk of not being able to systematically achieve your desired outcomes.

While empowerment and alignment are important reasons for developing a carefully crafted operating plan, they are not the only ones. Indeed, the operating plan will also serve as an excellent and accountable communication with your organization's senior level executives. To be sure, nothing speaks louder to organizational decision makers than a well constructed operating plan that outlines clear and concise outcomes and return on investment.

Finally, the operating plan is especially important in the event of turnover in key positions related to your company's wellness initiative. In fact, if you don't have an operating plan, and you lose a key member of your initiative, you generally have to go back and spend a significant amount of time, energy, and resources, reorienting a new person with what's already been done.

From the information that you provided when you completed the Well Workplace Checklist your overall rating for your operating plan, the fourth of the seven benchmarks, is:

**Your Score: 25**

In the paragraphs that follow, you will learn more about how we arrived at this rating and how you can strengthen your operating plan in the future.

At the Wellness Councils of America, we believe that there are seven components of an exceptional operating plan. These seven components include:

1. A Vision/Mission Statement For The Wellness Program That Incorporates The Organization's Core Philosophies;
2. Specific Goals and Measurable Objectives That Are Linked To The Company's Strategic Priorities;
3. Timelines For Implementation;
4. Roles And Responsibilities For Completion Of Objectives;
5. Itemized Budget Sufficient To Carry Out The Wellness Plan;
6. Appropriate Marketing Strategies To Effectively Promote The Wellness Plan;
7. Evaluation Procedures To Measure The Stated Goals And Objectives.

When taken together, these seven components become very powerful in providing you with the empowerment and alignment essential to keep your program moving forward. No matter what your score, your operating plan will need attention and updating every single year. With that in mind, let's take a brief look at each of the seven components of a results-oriented operating plan.

#### Vision/Mission Statement

In essence, the vision/mission statement is simply a one or two sentence declarative on what you'd like your program to ultimately accomplish. While many times people struggle with the idea of developing the vision/mission statement, it really doesn't have to be so complicated. Literally, the word vision means "to see." Consequently, the vision statement is what you see in the future for your program. For example, a large health care system developed the vision statement of "Health From Hire To Retire," as their ultimate declarative destination. You can see in one simple phrase, this company has a unique vision of what they want and see for their employees throughout their working history.

#### Goals and Objectives

Goals and objectives are an extremely important part of any results-oriented operating plan. In fact, clear goals and measurable objectives will ultimately tell you if you are moving in the right direction. Believe it or not, if you don't have clear goals and objectives, you can't really evaluate any outcomes--because your outcomes are based on what you said you would accomplish. Sadly, many programs don't wrestle with writing goals and objectives up front and as a result, suffer greatly when it comes to demonstrating outcomes. Specifically, you should strive to write SMART objectives.

S = Specific

M = Measurable

A = Achievable

R = Relevant

T = Time Based

### Timelines

Picking up from where the goals and objectives section leaves off, it is important to declare specific timelines on when things should get done. Timelines are absolutely important in any operating plan because they overtly state not only what you would like to accomplish, but also when you would like to get it done. Timelines help to hold everyone accountable and provide an excellent measure for how your team is doing. Be warned, timelines are not difficult to write, but they are very challenging to meet. There is an art to setting timelines. Think of it like a pressure cooker--not enough heat and nothing gets done, too much heat and a meltdown occurs.

### Roles and Responsibilities

Identifying the specific roles and responsibilities that your team members should play is the fourth critical part of a results-oriented operating plan. Although it seems straightforward, it is surprising how many operating plans don't specifically identify who or what group is going to be doing what and what they should be doing. When you think about assigning roles and responsibilities, it is important to think of this component in terms of individual strengths and talents.

In essence, the people on your team will bring three basic and innate talents/strengths to the table. First, there are relators. Relators are "people" people. They like to interact and their good at establishing relationships. These people are very important to any team because they bring the human element. Second, there are achievers. Achievers are those people who are uniquely wired to get things done. They like checklists and specific tasks and challenges. These kinds of people are critical to the success of teams because they keep the team on track in terms of getting things done. Finally, there are thinkers. Thinkers like to analyze what needs to be done and to carefully think through how things fit together. Thinkers are critical when it comes to tasks like analyzing data and thinking through the strategic ramifications of this kind of information.

The bottom line on roles and responsibilities is this. Roles and responsibilities should be aligned with individual strengths/talents. Saddling a "thinker" with "relating" responsibilities will only frustrate and complicate the dynamics of your team. Once again, the key is to align and empower individuals with roles and responsibilities that fit their unique strengths and talents.

### Itemized Budget

The itemized budget is the fifth component of a results-oriented wellness program. Although budgeting doesn't get most people excited, it is a very important of the planning process. It's important because it forces you to think through what you plan to invest in your wellness program and specifically what everything will cost. You'll want to include not only the costs associated with things like health risk appraisals, newsletters, brochures, and incentives, but also to think through what the "softer" costs will be. Softer costs include things like staff time, release time for employees to participate, and team strategic planning meetings. All of these things have very real price tags, so if your budget is to be complete and accurate, it's important to think through how much everything will cost.

### Marketing/Communication Strategies

The sixth component of a results-oriented operating plan is the execution of innovative marketing communications strategies. While this section sounds more complicated than it needs to be, there really is no mystery in this component. Marketing and communication strategies simply force you to think through how you're going to communicate the program to your employees and specifically what the messages should be. A good mix of marketing and communication strategies should be used. This mix should include written, oral, and electronic messages. In essence, no one in your organization can be expected to get involved in the program if they don't know what's going on and specifically how they can participate. That's the challenge and the purpose of this component.

### Evaluation

The evaluation section of your plan is the seventh and final component of a results-oriented operating plan. The evaluation section simply and straightforwardly outlines how you plan to measure and evaluate the results that occur from your program. Evaluation measures can and should include things like participation, participant satisfaction, changes in knowledge, attitudes and behaviors, and ultimately changes in environment and culture. Some like to think of evaluation in terms of keeping low-risk employees at low-risk and helping high-risk employees return to low-risk status. However you choose to structure your evaluation efforts, it is essential that your evaluation methods link back directly to the program's goals and objectives.

### Summary

If you scored high in terms of your operating plan, the challenge will be in keeping your plan fresh and up-to-date. To be sure, this is no easy task. If you still have some work to do in terms of raising your overall score for your operating plan, we encourage you to go back and review each one of the components and systematically develop your operating plan in a way that corresponds to the seven essential components. In either case, your operating plan is something that requires thoughtful time and attention and it's something that has to be done each and every year. The good news is this, once you complete your first operating plan, you have laid the foundation for the future and the hardest work is behind you.

YOUR RESULTS FOR BENCHMARK #5

# PROGRAMMING/INTERVENTIONS





## **Benchmark #5: Choosing Appropriate Health Promotion Interventions**

The fifth benchmark of a results-oriented wellness program is choosing the appropriate health promotion interventions to offer your employees and their dependents.

What separates the Well Workplace process from other activity-centered approaches to corporate health promotion is the fact that within the seven benchmarks model, the health interventions that a company offers are predicated upon the data that has been collected in benchmark three and articulated in the organization's operating plan (benchmark four). By offering programs that are consistent with what the organization needs and the employees are interested in, the health promotion interventions you offer in following the Well Workplace process, will be much more straightforward, rational, and effective.

Although each company is very different in terms of employee demographics, organizational mission, and corporate culture, it is safe to say that there are a number of programs that will be appropriate for any working population--and will be supported by the data that you have collected. Potential programs that can and should be offered include but are not limited to: physical activity, nutrition/weight management, smoking cessation, responsible alcohol use, stress management, medical self-care, financial management, ergonomics, mental health/depression, disease management, and work/family balance.

To date, there have been a number of companies that have built their programs around the Well Workplace seven benchmarks and have gathered data, written a plan, and offered targeted and data-driven interventions to their employee populations.

When it comes to choosing and offering the appropriate health promotion interventions for your employee population, there are several issues that should be considered in advance. These issues include: 1.) what programs you will offer; 2.) how intensive the intervention will be (awareness, education, behavior change, cultural enhancement); 3.) how often the programs the programs will be offered; 4.) who they will be offered to (spouses, dependents, retirees); and 5.) what incentives will be used to increase participation.

## **Your Score: 32**

To learn more about your rating concerning your programming efforts, please review the information provided in this section of the report.

## Interventions and Programming Subsection 1: Our Organization's Program Offerings

The initial issues of successful wellness programming pertain to the programs you will choose to offer your employees, the level of intensity at which they will be offered, and how frequently they'll be made available. In essence, you can think of this as the development of your programming portfolio.

As mentioned previously, program offerings can include but are not limited to: physical activity, nutrition/weight management, smoking cessation, responsible alcohol use, stress management, medical self-care, financial management, ergonomics, mental health/depression, disease management, and work/family balance. The programs can be offered at the awareness, education, behavior change, or cultural enhancement levels. Finally, these programs can be offered monthly, quarterly, annually, or every 24 months, depending on the needs of your employees.

An excellent example of a company that routinely offers an excellent portfolio of programs is Highsmith Inc. Located in Fort Atkinson, WI, this company of approximately 250 people has developed "Highsmith University." And like any University, there is open enrollment in which employees can register for the courses they would like (and need) to take. This program is called T.A.G., and open enrollment is offered multiple times each year. Because programs can be taken on work time, participation rates are very high. For its innovative programming efforts, Highsmith Inc. received WELCOA's Platinum Well Workplace award.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for programs and interventions is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you consider broadening your programming in three specific areas--the types of programs you're making available, the intensity level at which they're being offered, and the frequency in which they occur. Certainly, it's understood that health promotion programming is largely dictated by the time, resources and staff available to deliver these important initiatives. However, the Wellness Councils of America encourage every company no matter what size or geographic location to constantly work to make more programs available. After all, the programming--the fifth benchmark of the Well Workplace process--is where the rubber meets the road and without constant innovation and expansion, employees will struggle with maintaining their health status.

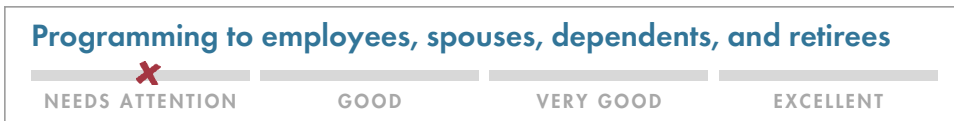
## Interventions and Programming Subsection 2: The Populations To Which Our Programs Are Offered

The next major issue that must be addressed within the context of health promotion programming is the populations to which your programs are offered.

Specifically, programs can be offered to employees, spouses/dependents, and retirees. Certainly, the most common population catered to is generally the employees themselves. However, more and more companies are beginning to recognize that spouses and dependents, as well as retirees, are important populations that need to be reached.

An excellent example of a company that works hard to make programs available to multiple populations is Greater Omaha Packing Co, Inc. Located in Omaha, NE, this exemplary worksite wellness initiative offers programs to employees, spouses and their dependents. What's even more remarkable is the fact that a significant percentage of Greater Omaha Packing's population speaks Spanish. For many companies this hurdle would be too high to overcome. However, with hard work and a sincere commitment to keeping their employees healthy and well, Greater Omaha Packing is an excellent example of a company that is "world class" in this area.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for programming to employees, spouses, dependents, and retirees is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you concentrate your efforts on providing programs to your immediate employees. By offering programs to your employees, it is an excellent way to make inroads in not only improving their health status, but you'll also build your confidence in taking these programs to other groups like spouses, dependents, and retirees.

## Interventions and Programming Subsection 3: Our Programming Incentives

The final issue that should be considered within the context of health promotion programming is the incentives which are presently being offered.

While it's one thing to provide excellent programming, it's entirely another to have high participation rates. To be sure, participation rates are not dictated by luck. In fact, it has been our experience in working with some of America's Healthiest companies that participation rates have been generated by careful and conscious use of incentives.

Incentives can range from things like T-shirts and water bottles all the way to health insurance premium savings. Specifically, there are eight basic types of incentives:

- Merchandise (e.g., T-shirts, movie passes)
- Lottery prize drawings
- Employee recognition
- Well days off
- Cash
- Medical plan coverage enhancement
- Health plan contributions
- Medical spending accounts

While some health promotion practitioners don't feel like incentives should be a part of wellness offerings, it is important to understand that incentives are powerful motivators that can absolutely and definitively increase participation. For example, a \$25 cash incentive can generally generate 50% participation in a company health risk appraisal offering, whereas, an HRA offering without an incentive will generally draw a modest 10-15% turnout.

Recently, BlueCross BlueShield of Nebraska (BCBSNE) conducted an organizational health fair and offered their employees an opportunity to complete a Health Risk Appraisal. By making two movie tickets available for each employee who completed the HRA, BCBSNE had a participation rate of approximately 75%. This gives you an excellent illustration of how powerful incentives can be.



To improve your rating in this area, it is recommended by the Wellness Councils of America that you concentrate on increasing the number and amount of incentives that are being offered. To keep programs exciting and fresh, it is essential that creative incentives be woven in to all program offerings. In order to take your program to the next level it is recommended that you examine more closely the types of incentives that are being offered and the populations that they are being offered to.

YOUR RESULTS FOR BENCHMARK #6

# SUPPORTIVE ENVIRONMENTS

 **Benchmark #6:  
Creating A Supportive, Health-Promoting Environment**

The sixth benchmark of a results-oriented wellness program is creating a supportive, health-promoting environment.

For years, it was believed that if you simply provided employees with the proper educational opportunities to improve their health, positive changes would transpire. Over time, we have learned that it takes much more than just educational opportunities to bring about desired and ongoing changes in personal health behaviors. This is where a supportive environment can play a critical role in helping employees to adopt healthier behaviors.

This makes sense when you really think about it. For example, if a company provides weight management classes and coaching opportunities, but only provides high-fat, non-nutritious foods in their vending machines and cafeterias, it is unlikely that people will be able to maintain any long term behavior change. Similarly, if a company provides opportunities for smoking cessation classes, but does not create a supportive environment by banning smoking from the building, it is unreasonable to think that positive, healthier changes will occur. In fact, environmental modifications--like the Clean Indoor Air Act--probably had a greater impact on reducing the smoking rates in the United States than all of the smoking cessation classes combined.

There are nine subsections to this benchmark. These subsections include environmental modifications to: 1.) increase physical activity; 2.) reduce tobacco use; 3.) promote better nutrition; 4.) improve workstation ergonomics; 5.) reduce unintended on-the-job injuries; 6.) extinguish the use of alcohol and other drugs; 7.) better manage and reduce job-related stress; 8.) increase participation among all employees including shift workers and those located at remote sites; and 9.) maintain organizational benefits that protect and promote good health among all employees.

When taken together, these nine environmental modifications can create a positive health-promoting culture within any organization.

From the information that you provided when you completed the Well Workplace Checklist your overall rating for supportive environments, the sixth of the seven benchmarks, is:

**Your Score: 56**

In the pages that follow, you will learn more about how we arrived at the rating of your approaches to creating a supportive, health-promoting environment.

## **Supportive Environments Subsections 1-7: Our Organization's Environment As It Relates To Promoting Healthier**

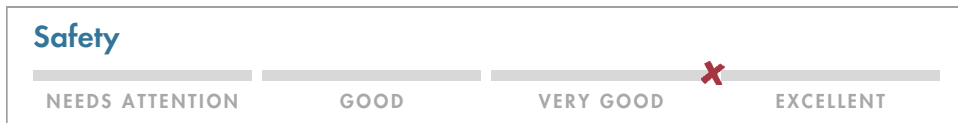
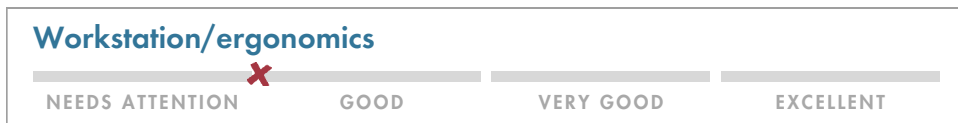
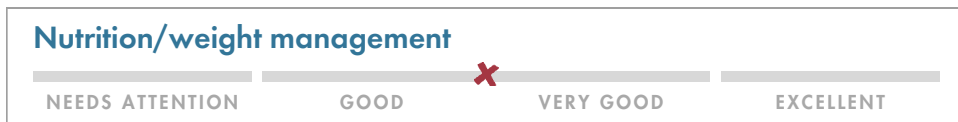
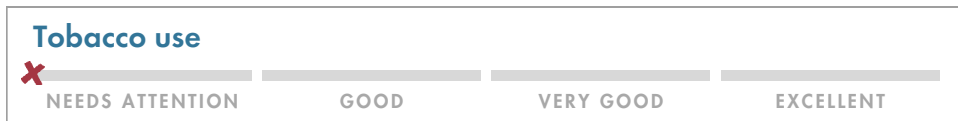
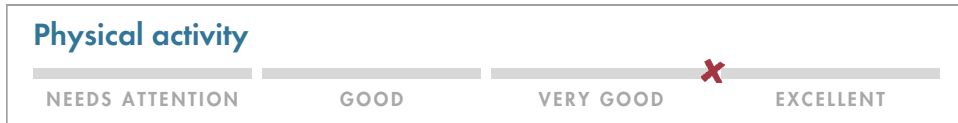
This portion of the report addresses your organization's efforts to create supportive, health-promoting environments as it relates to seven individual behaviors. Specifically, these behaviors include: 1.) physical activity; 2.) tobacco use; 3.) nutrition; 4.) workstation ergonomics; 5.) on-the-job injuries; 6.) alcohol/drugs; and 7.) job-related stress.

In order to build a results-oriented wellness initiative that will last over time, it's essential to develop specific strategies for systematically improving the physical working environment of your employees. In fact, in order to lead healthier lives, employees need to have the environmental support in the seven areas listed above.

Although it has been relatively rare for companies to take aggressive environmental modification approaches to the working environment, more and more companies are adopting these important strategies. For example, Union Pacific Railroad has strengthened its environmental commitment to reducing tobacco-related illnesses by implementing a policy that prohibits hiring smokers or tobacco users.

Another example of a company that is making remarkable environmental modifications is ConAgra Foods, Inc. Located in Omaha, NE, ConAgra Foods has developed extremely nutritious cafeterias as well as providing employees with exemplary workout facilities. Even small employers like Townsend Engineering are taking aggressive approaches to environmental modifications. This is evident from the 30,000 square foot fitness facility they offer to their 250 employees.

Based on the information you provided in the Well Workplace Checklist, your organization's overall ratings for creating a supportive environment as it relates to the aforementioned seven specific health behaviors are:



To improve your ratings in these areas, it is recommended by the Wellness Councils of America that you concentrate on making improvements in all seven environmental areas. By making these changes, you will have taken important steps in creating an environment that promotes health and supports individual decisions to lead healthier lifestyles. Although environmental modifications are oftentimes some of the most difficult changes to incorporate, they are often the most effective and long-lasting. Striving to create this type of a working environment is a noble undertaking--a road that few have chosen to go down. However, if you are looking to improve the overall effectiveness of your wellness program, we would encourage you to examine these seven opportunities closely and aggressively incorporate changes where necessary.



## Supportive Environments Subsection 8: Our Organization's Environment As It Relates To Promoting Participation

This portion of the report addresses your organization's efforts to create supportive, health-promoting environments as it relates to encouraging participation.

Through the research that has been conducted over the last decade, we now know that it is possible to create environments that promote participation. In fact, specific policies that address release time to participate in health promotion activities during the workday can systematically increase participation. Furthermore, policies that ensure that health promoting activities are made available to shift workers as well as employees that are located at remote sites can make a significant difference when it comes to improving health.

An excellent example of a company that has incorporated these types of policies and environmental modifications is Northeastern Log Homes in Bangor, ME. This organization has made it a priority to provide employees with release time in the morning and afternoon for the purpose of increasing physical activity. Specifically employees are allowed 15 minutes in the morning and another 15 minutes in the afternoon to take walks on the trails adjacent to company property. In response, a significant portion of Northeastern Log Home's employees are now regularly participating in health promotion activities.

Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for creating a supportive environment as it relates to promoting participation is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you evaluate your company's thinking on providing these types of policy changes within your organization. Many times, companies will spend time and money on creating educational wellness opportunities, but won't take the next step of providing release time to increase participation. We encourage you to consider the benefits of incorporating these kinds of release time policies. In addition, your organization would be wise to make sure that every employee--regardless of the shift or geographical location--has the opportunity to take part in health enhancing programs.

## **Supportive Environments Subsection 9: Our Organization's Benefit Plan As It Relates To Health And Well Being**

This portion of the report addresses your organization's efforts to design a benefit plan that promotes better health and well being for your employees.

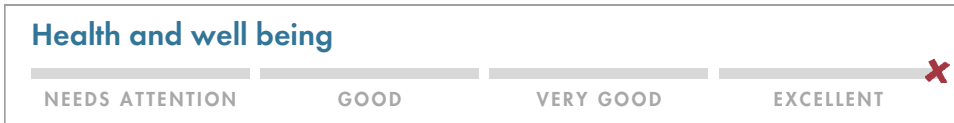
It's clear that a well designed benefit package can go a long way toward keeping your employees healthy. There are specific elements that can be woven into a progressive benefits package that will help to get this job done. These include:

- Health Insurance
- Disability Protection
- Life Insurance
- Sick Leave/Well Days Off
- Leave of Absence
- Compensatory Time Off
- Vacation
- Flex Time
- Job Sharing
- Work at Home/Teleconferencing
- Maternal/paternal Leave
- Family Leave
- Child Care
- Dependent Care Flexible Spending Accounts
- Health Promotion Program Prepayment Or Reimbursement
- Retirement/Investment Plan
- Tuition Reimbursement
- EAP

There are numerous examples of companies that are working hard to improve the benefits that they are offering their employee population. At the Wellness Councils of America, we believe that this is time well spent and an excellent investment in both your employees' health and their longevity with your company.

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Based on the information you provided in the Well Workplace Checklist, your organization's overall rating for creating an exemplary benefits package as it relates to health and well being is:



To improve your rating in this area, it is recommended by the Wellness Councils of America that you continue offering your present portfolio of benefits. From the information you provided, it is evident that your benefits package is one of the most generous and aggressive plans that employers are presently offering. Congratulations on a job well done!

YOUR RESULTS FOR BENCHMARK #7

# EVALUATION

 **Benchmark #7:  
Carefully Evaluating Outcomes**

The seventh and final benchmark of a results-oriented wellness program is carefully evaluating program outcomes.

Evaluation is the lynchpin that holds the other six benchmarks accountable. Indeed, a sound evaluation strategy allows you to understand which elements of your program are working and which need attention. Specifically, there are eight primary variables which make excellent evaluation targets.

These eight variables include:

- Participation
- Participant Satisfaction
- Improvements in Knowledge, Attitudes and Behaviors
- Changes in Biometric Measures
- Risk Factors
- Physical Environment and Corporate Culture
- Productivity
- Return On Investment

Despite the sentiment that evaluation is too complicated to be completed without the help of researchers, it actually is quite straightforward process. But make no mistake, evaluation efforts can only be conducted if you have written, measurable objectives.

To date, there have been hundreds of companies that have designed their programs using these seven benchmarks--relying on the final benchmark to evaluate and document outcomes.

From the information that you provided when you completed the Well Workplace Checklist your overall rating for your evaluation efforts, the seventh and final benchmark is:

**Your Score: 0**

In the paragraphs that follow, you will learn more about how we arrived at this rating and how you can strengthen your evaluation efforts in the future.

At the Wellness Councils of America, we believe that again, there are eight basic variables that can be the emphasis of an evaluation plan. These eight evaluation targets are briefly discussed below.

#### Participation

Although a basic measure, participation is an excellent barometer of how your wellness program is functioning. Participation can have a variety of meanings--all of which have some level of basic validity. For example, some people define participation as any employee who has participated in a program at least once during the course of the year. Others define participation as how many people take part in programs more regularly. To be sure, measurement of participation is a discussion that has been debated by many. Nevertheless, it is an important evaluation target and should be included in any basic strategy.

#### Participant Satisfaction

The second basic evaluation measure is participant satisfaction. Specifically, participant satisfaction can be measured through the administration of a simple survey at the completion of a program. Although, high participant satisfaction ratings do not necessarily mean that your program will achieve return on investment, it does indicate that participants feel good about the message that you are communicating.

#### Improvements in Knowledge, Attitudes, Behaviors

The third basic evaluation measure is improvement in knowledge, attitudes, and behaviors. As we move into more sophisticated measures of evaluation, these three items become important variables when discussing the outcomes of any results-oriented initiative. With the advent of technology, measuring changes in knowledge, attitudes, and behaviors is becoming much more straightforward. Moreover, as health promotion programs continue to gain popularity, more and more standardized instruments have become available to help practitioners measure these important variables.

#### Changes in Biometric Measures

Changes in biometric measures constitute the fourth basic evaluation target. Biometric measures include such things as cholesterol levels, blood pressure, and BMI (body mass index). When programs begin evaluating changes in biometric measures, they are moving into a more elite level of program documentation. Changes in biometric measures are a highly valued form of evaluative feedback, but careful design of programs and interventions is essential in order to systematically gather this type of information.

#### Risk Factors

Popularized by Dr. Dee Edington of the University of Michigan, the idea of evaluating on risk factor status has gained enormous popularity. In essence, the idea is to identify individuals who are at-risk (generally defined as four or more risk factors) and intervene to make sure that the individuals don't progress further along the disease continuum. Conversely, the accompanying strategy is to make sure that low-risk employees (generally defined as zero to one risk factor) don't migrate from low-risk status toward the at-risk category. With this framework in mind, many are choosing to evaluate their programs using this robust model and individual variables.

#### Physical Environment and Corporate Culture

Because corporate culture and the physical working environment plays an integral role in whether employees stay healthy or get sick, many organizations have begun incorporating evaluation targets that concentrate on measuring and detecting changes in the physical working environment and the culture of the corporation. Made popular by such researchers as Dr. Judd Allen and Dr. Rick Bellingham, measurements of corporate culture and the physical environment are important factors that should be monitored and incorporated into any results-oriented wellness program.

#### Productivity

The seventh potential evaluation target is measuring the impact of wellness initiatives on key productivity indicators such as absenteeism, turnover, morale, etc. This area is a relatively new development in the arena of corporate health promotion initiatives. However, there are excellent resources and instruments available through such groups as the Institute for Health and Productivity Management (IHPM).

#### Return On Investment

Last but not least is the evaluation target of return on investment. Often viewed as the gold standard of evaluation efforts, return on investment is quickly catching on as an excellent measure by which corporate wellness programs can be evaluated. Leaders such as Dr. Ron Goetzel, Larry Chapman, and Dr. Joe Leutzinger have blazed the trail whereby many companies now can begin to assess the impact of their programs in terms of ROI. Most often, this analysis requires outside investment and expert consultation.

#### Summary

Like the operating plan, evaluation is something that must be performed on an annual basis. As you review this report, we encourage you to measure your program in concert with these eight basic evaluation targets--and to increase the sophistication of your evaluation efforts each and every year.