

**Well Workplace Award
Executive Summary**

Union Bank and Trust Company

Silver Award

Information in this publication is carefully reviewed for accuracy. Questions, comments, or ideas are welcome. Please direct to Dr. David Hunnicutt, Executive Editor, at the address below.

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General Information

WELL WORKPLACE

Silver Application

Basic Information

Name of Organization Union Bank and Trust Company

Address of Organization _____

Council Affiliation Member of Workwell

Contact Person Lois Watkins

Title Credit Administrator

Work Telephone _____

Fax Number _____

E-Mail Address _____

Alternate Contact Brad Nelson

Parent Organization None

Number of Sites Covered by this Application 12

Number of Employees Covered by this Application 613

Nature of Business or Industry Banking

Name of CEO Angela Muhleisen

Date of Application May 2003

Preface

Organizational and Program Background

Union Bank is a full service state bank and trust currently maintaining over 600 employees. Purchased in 1965, the bank has grown from 20 employees and now has locations throughout Nebraska. Union Bank's mission statement consists of three main corporate goals. The first is customer service. UB strives to provide service superior to the competition. Secondly, UB is committed to employee satisfaction. The focus of the bank is to foster a quality work atmosphere where trust and loyalty exist between employer and employee. Third, Union Bank is committed to being a financially diverse company by continually broadening our base to include non-traditional niche markets and purchasing other financial businesses.

The mission statement of the wellness committee is to improve the health, job satisfaction, and general well being of our employees by implementing programs and activities based on our employees' needs and interests. Formed in 1993, the Union Bank Wellness Committee has grown from a few original members that met 2-4 times per year and offered only a couple activities per year to a proactive group that offers numerous health activities and programs for the benefit of its employees. The committee now meets once per month and fully manages the budget and schedule of the yearly activities offered by the bank. Committee chairman Brad Nelson is a vice president in the credit department. The Wellness Committee is headquartered within the credit department, to

facilitate the administration of the programs by Mr. Nelson and his support staff. All communication to committee members, senior management, and the employee population is directed out of this office.

The support from Union Bank's senior management has been crucial in the success of the Wellness program. Senior management provides funding for all of the Bank's wellness programs, and many of the Bank's top managers take part in the numerous activities sponsored by the wellness committee. Committee Chairman Brad Nelson assumes the role of communicating the wellness committee's needs to senior management and acquiring the necessary resources to keep the program running successfully.

Another primary component to Union Bank's wellness program is the wellness team. The wellness committee is made up of fifteen members from a variety of departments around the bank. This allows for more widespread communication between the wellness committee and Union Bank employees. Each member of the wellness team plays a role in organizing, promoting, or directing wellness activities. The committee members are also responsible for generating new ideas for health related programs and benefits for Union Bank employees.

The wellness program provides numerous functions for the benefit of UB employees. First of all, the committee completes and analyzes research of employee needs and wants. Then, the committee is responsible for implementation of new programs, maintenance of said programs, and periodic evaluations of the effectiveness and interest level. The

committee is also responsible for the yearly budget and any hiring and scheduling of speakers or health professionals.

To assist in reaching Union Bank's wellness objectives, the wellness committee created a wellness, operating plan. Union Bank employees were surveyed to customize the program to their health wants and needs. The five main areas that the plan focuses on are stress, weight management, awareness of blood pressure and cholesterol, CPR training, and frequent physical examinations, primarily for males. The operating plan also includes the Wellness Program's mission statement, objectives, delineation of roles, and time lines for each area of the plan. The plan also briefly illustrates programs created to aid in reaching corporate wellness goals and expresses methods of measuring success in reaching our wellness objectives.

Our wellness programs and activities are tailored specifically for the needs of Union Bank employees and are built based upon our five main areas of focus. We have several weight management programs including Summer Olympics and health club reimbursement. To aid in stress reduction our wellness program offers Lunch n' Learn sessions about managing stress, dry cleaning pick up and delivery, lactation rooms for nursing mothers, and seated massages at work. Blood pressure and cholesterol screenings are offered annually at our health fair. The Union Bank wellness committee also offers CPR training once a year in conjunction with the Union Bank safety committee.

The supportive environment here at Union Bank is created partially through the many benefits offered by the Bank. Some of these include life insurance, health insurance, sick leave/well days off, an employee assistance program, health club reimbursement, and tuition reimbursement. The bank also has several supportive policies such as emergency procedures and tobacco restrictions.

The primary way in which we measure our program success is by surveying employees. Employees were initially surveyed to determine the bank's primary health concerns. The same survey will be administered in the future to track the program success and identify areas for improvement. The survey will also allow us to recognize any change in employee health interests. The wellness team has also done surveys to determine employee satisfaction with specific wellness programs and searches for ways to improve our wellness program.

An individual who has played an important role in the development of the wellness programs offered at Union Bank is Lois Watkins. She has been involved in hiring and working with an intern to prepare the applications for the bronze and silver Well Workplace. She schedules committee meetings and prepares the agenda; is responsible for health club and weight loss reimbursements; serves on various committees for wellness programs; and coordinates seated massages and flu shots. Lois also serves on the WorkWell Board of Directors as treasurer. She truly believes that Union Bank's involvement in WorkWell and the Well Workplace have helped us focus our wellness

programs on the needs and interests of our employees. WorkWell's programs have been instrumental in our providing lactation rooms for nursing mothers, a discount for CT heart scans, and numerous speakers. Networking and consulting provided by Workwell have helped us develop new ideas and programs.

The wellness committee's positive effect on Union Bank has been a true team effort. Everyone on the committee plays a role in making Union Bank a well workplace, either through planning and promoting wellness programs, researching current health topics, or encouraging co-workers to participate in events. As mentioned earlier, Brad Nelson is the Committee chairman and plays the leading role. This is one of the most unique strengths that our wellness program offers; all of its members are volunteers who really want to make the wellness program at Union Bank great, and have a genuine concern for the overall health of the company.

Our second unique strength is the frequency that our programs are offered. Programs such as the B2B, Summer Olympics, and Nebraska fitness challenge are offered throughout the year giving employees incentives to continue exercising. Employees are also reimbursed for attending weight loss meetings, weight loss meetings are offered at work, and luncheon speakers on nutrition encourage healthy lifestyles. There are frequent Lunch n' Learn speakers on a variety of topics, and services such as Dry Cleaning and Massage Therapy are continuously offered all year long.

Our third unique strength is the educational programs that we offer. It is important to give employees the information necessary to take responsibility for their own wellness needs. This is done constantly through our Lunch n' Learns and annually at our Health Fair. A very important part of a wellness program is to motivate employees to become proactive with their health and our educational programs assist in accomplishing that.