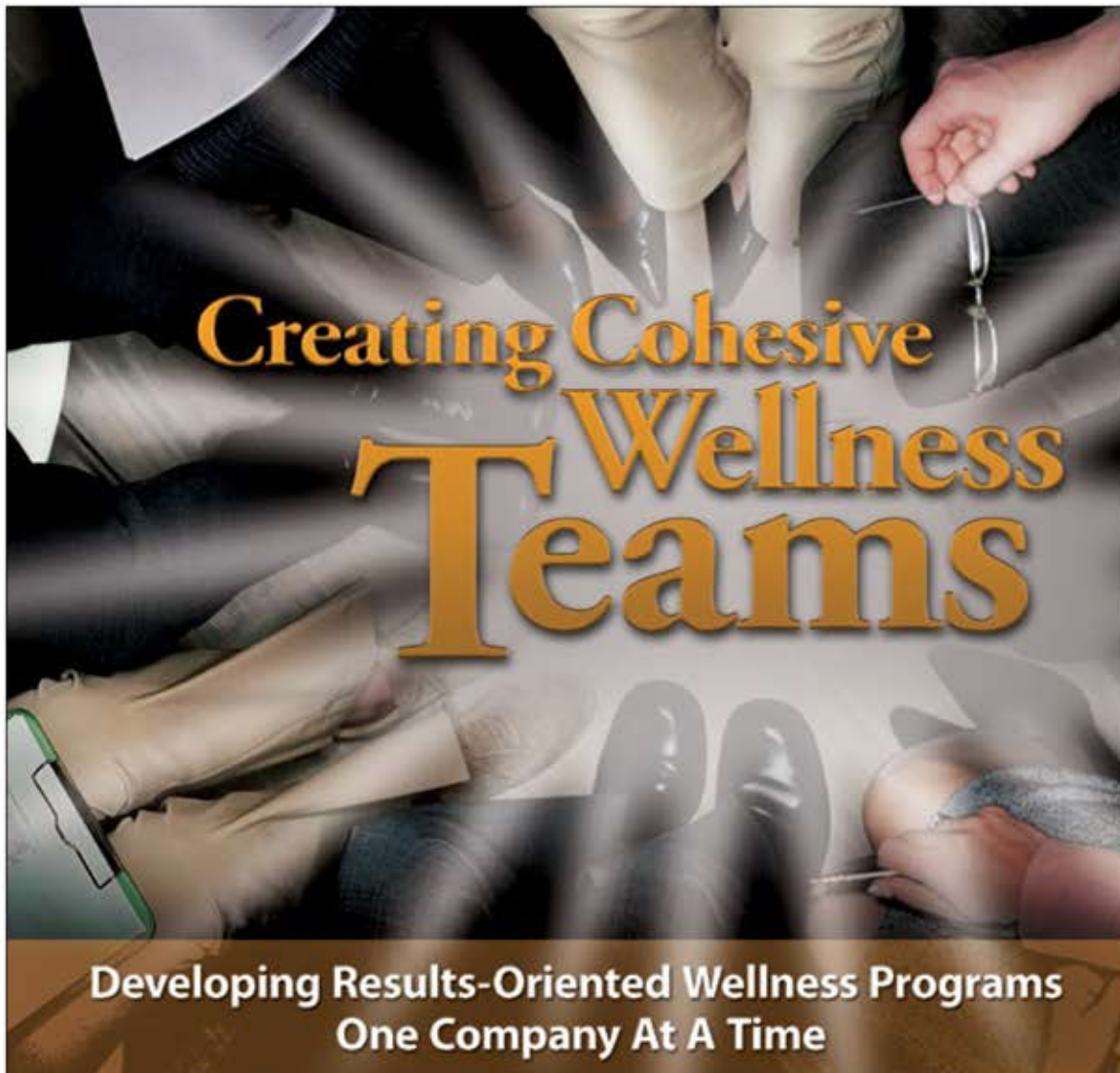


Absolute ADVANTAGE

THE WORKPLACE WELLNESS MAGAZINE



Creating Cohesive Wellness Teams

Developing Results-Oriented Wellness Programs
One Company At A Time



IN THIS ISSUE:

In this issue of *Absolute Advantage*, we are concentrating our energy on illuminating the best practices of cohesive worksite wellness teams. Specifically we've identified the 10 secrets of successful worksite wellness teams as well as provided information on how your team can catch fire. To complete this issue, we've included an important case study and an insightful expert interview.

Each month you can learn more about the articles in *Absolute Advantage*. Simply log on to WELCOA's members only website to get more in-depth coverage of the topics that matter most to you. Find full-length interviews, expert insight, and links to additional information that will help you do your job better!

THE WELLNESS COUNCILS OF AMERICA

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LETTER FROM THE **EXECUTIVE EDITOR** | DAVID HUNNICUTT, PhD

Creating Cohesive Wellness Teams

Developing Results-Oriented Wellness Programs One Company At A Time

This issue of *Absolute Advantage* is all about wellness teams.

The second of the seven critical benchmarks of success, Creating A Cohesive Wellness Team, is a vital step in developing a results-oriented worksite wellness program. With this in mind, we've devoted the entire issue to this benchmark.

To get you started, we've identified the 10 secrets of successful wellness teams. In this article, you'll find great information from some of the nation's best practitioners.

Next, we've set forth a series of important recommendations that, if followed, can help your wellness team catch fire. We're betting that these suggestions will make perfect sense and ignite a new passion in your team.

Having set forth a general framework and ideas on how you can implement it, we then identify one of the best tools for helping your wellness team to build its collective muscle. Developed by the Gallup Organization, the tool is StrengthsFinder™, and I think you'll find this article fascinating.

Heading down the home stretch, we've included an expert interview from Dr. Lee Handke, Vice President of Wellness from Blue Cross Blue Shield of Nebraska. In this interview, Dr. Handke shares a number of important insights about wellness teams and how to effectively use them to create a healthier organization.

Following this interview we've included the amazing case study of JEA. This Jacksonville-based company has done some pretty remarkable things in the area of wellness—and a great team has helped to drive the process.

We hope that you enjoy this issue of *Absolute Advantage*, and find it useful in your quest to fully implement the seven benchmarks of success in your organization.

Yours in good health,

Dr. David Hunnicutt
President

“Creating A
Cohesive Wellness
Team is a vital step
in developing a
results-oriented
worksite wellness
program.”



Absolute ADVANTAGE

VOLUME 6, NUMBER 3
THE WORKPLACE WELLNESS MAGAZINE

Organizational Founder, William Kizer, Sr.

WELCOME

Absolute Advantage is the interactive workplace wellness magazine that helps large and small employers link health and well-being to business outcomes. *Absolute Advantage* arms business leaders and wellness practitioners with leading-edge workplace wellness information straight from the field's most respected business and health experts.

With its online component, *Absolute Advantage* provides the industry's most current and accurate information. By logging on to the magazine's interactive website, you can access a whole new world of health promotion—including in-depth interviews with national health promotion experts and insider's information about industry products.

SUBSCRIPTION INFORMATION

For information about subscribing to *Absolute Advantage*, contact the Wellness Councils of America at (402) 827-3590 or via e-mail at wellworkplace@welcoa.org.

Ab-sol-ute Ad-van-tage:

When a company can produce more than its competitors—even though they have the same amount of resources—it has an absolute advantage.

We believe wellness is that advantage.

EXECUTIVE EDITOR | David Hunnicutt, PhD

Dr. Hunnicutt is President of the Wellness Councils of America. As a leader in the field of health promotion, his vision has led to the creation of numerous publications designed to link health promotion objectives to business outcomes.

SENIOR EDITOR | Mike Perko, PhD

Dr. Perko has significant experience in worksite wellness. Currently the Chair of Health Education at the University of Alabama, Dr. Perko also serves on WELCOA's Medical Advisory Board and often speaks on behalf of the Wellness Councils of America.

MANAGING EDITOR | Brittanie Leffelman, MS

Brittanie is the Director of Operations and manages major writing projects at WELCOA. With a Master's Degree in Health Promotion, she regularly coordinates national health forums, major grants, and state and local wellness initiatives.

DIRECTOR OF MARKETING | William Kizer, Jr., MBA

As Director of Marketing, Bill is responsible for the design and oversight of WELCOA's marketing programs. With a Master's Degree in Business Administration, he communicates the value and benefits of WELCOA and its many products to organizations around the country.

DIRECTOR OF MEMBERSHIP | David Steurer, MEd

As WELCOA's Director of Membership, David is responsible for recruiting and servicing member organizations throughout the United States. David's background has been grounded in worksite wellness for the past 25 years.

DIRECTOR OF COMMUNITY AFFAIRS | Kelly Stobbe, MEd

As the Director of Community Affairs, Kelly is responsible for leading WELCOA's cadre of locally-affiliated wellness Councils. In this capacity, Kelly coordinates the *Well Workplace* awards initiative as well as the *Well City USA* community health project.

DIRECTOR OF DESIGN & TECHNOLOGY | Justin Eggspuehler

A 2001 graphic design graduate from Iowa State University, Justin studied design in Rome, Italy before joining the WELCOA design staff. He is responsible for the layout and design of many publications including *The Well Workplace* newsletter and *Absolute Advantage* magazine.

MULTIMEDIA DESIGNER | Adam Paige

Adam joined WELCOA in early 2005. With corporate experience in design and videography, he brings a wealth of talent to WELCOA's publication. In the capacity of a multimedia designer, Adam contributes to the publications of *The Well Workplace* newsletter and *Absolute Advantage* magazine.

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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The 10 Secrets of Successful Worksite Wellness Teams

When it comes to building results-oriented wellness programs, teams are a big part of the equation.

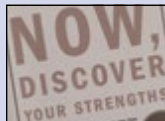
In this article, we'll share the 10 secrets of successful worksite wellness teams.

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14 Catch Fire: Great Ideas For Infusing Energy And Commitment In Your Wellness Team

It comes as no surprise that teams with great energy produce great results. You can make sure your wellness team is energetic by implementing the following suggestions.



18 Building Team Muscle: Assessing Individual Strengths To Develop A More Effective Wellness Team

It's been said that there is no "I" in team. We disagree. In this article, we'll present a great tool for assessing individual strengths to help your team become stronger and more effective.



22 It's All About Teams

When it comes to wellness at Blue Cross Blue Shield of Nebraska, it really is all about teams. In this expert interview, Dr. Lee Handke, Vice President of Wellness shares fascinating insights about the wellness team at BCBSNE.



32 Case Study: JEA

JEA is a remarkable case study of how an organization started with a novel idea and developed a team to get the process started. Over the years, JEA has continued to refine its approach to wellness. Today they are one of America's healthiest companies.



52 Form and Function

In this article, three top wellness minds reveal important insights regarding team size, team strengths, and decision making.



WELCOA's Well Workplace Initiative

The Seven Benchmarks of Success



For the past 20 years, the Wellness Councils of America has dedicated its efforts to studying and promoting the efforts of America's Healthiest Companies. During that period, WELCOA developed its patented Well Workplace process. At the core of the Well Workplace model, we have identified seven key benchmarks of success.

Specifically, these seven benchmarks are inherent in companies that have built results-oriented workplace wellness programs.



Capturing CEO Support

From our experience, CEO support is essential to the process of developing best-in-class programs. Indeed, we know of very few programs that have contained costs and improved employee health that don't have strong senior level support.



Creating Cohesive Wellness Teams

Once CEO support has been captured, the next task is to create a cohesive wellness team. Teams are essential to building great wellness programs because they help to distribute the responsibility for wellness throughout the organization.



Collecting Data To Drive Health Efforts

The team's first and primary responsibility is not to start offering programs, but rather to step back and gather important data. The data will be collected using corporate culture audits, health risk appraisals, and knowledge and interest surveys. This data is extremely important because it will reveal the specific areas of health needs and interests within the organization.



Carefully Crafting An Operating Plan

With essential forms of data having been collected, the task is now to develop an operating plan for health and wellness within the organization. This operating plan will serve as the roadmap and will guide the company's efforts and investments in workplace wellness.



Choosing Appropriate Interventions

With the first four benchmarks completed, it is now appropriate to begin choosing and implementing the appropriate health and productivity interventions. These interventions will most likely include tobacco cessation, physical activity, weight management, self-care, and stress management. But, they also may include things like fatigue management and ergonomics—depending on what the company's data reveals.



Creating A Supportive Environment

Once the appropriate health promoting interventions are up and running, it's time to create a supportive environment. Indeed, by having a supportive environment, organizations can be confident that employees will be supported in their efforts to lead healthier lives. Environmental interventions may take the form of policies, physical modifications, and rewards and incentives.

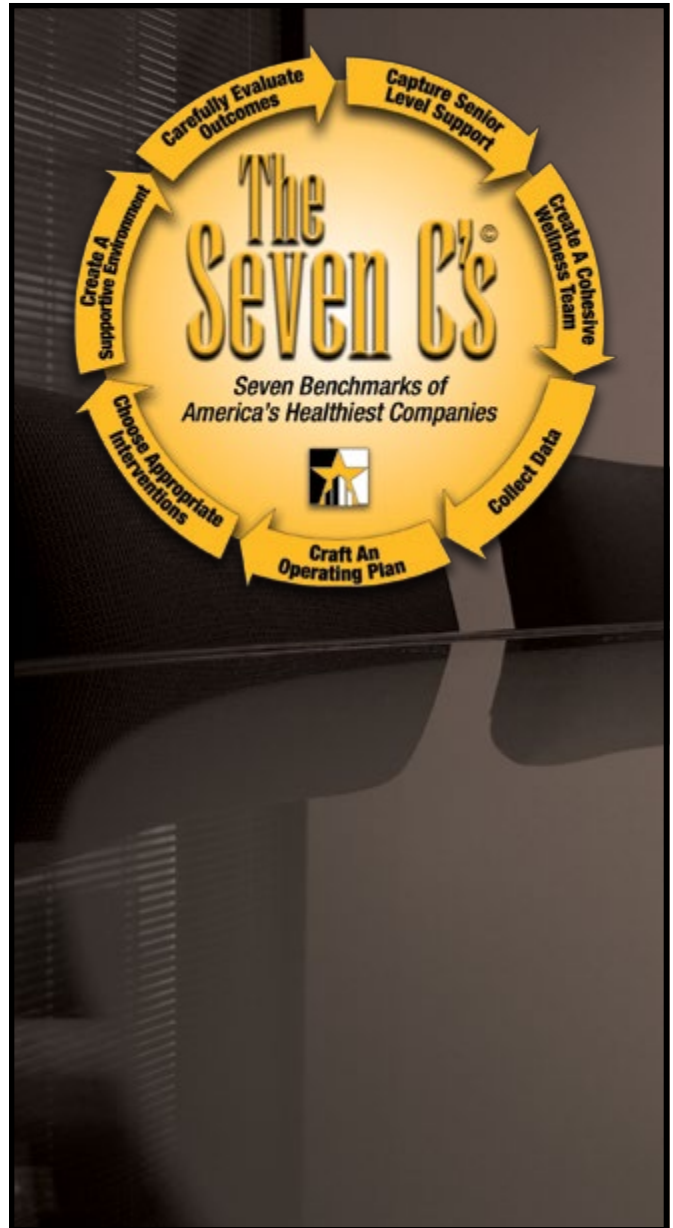


Benchmark #7

Carefully Evaluating Outcomes

The seventh and final benchmark in the Well Workplace model is carefully evaluating outcomes. It is within this benchmark that companies will religiously keep score when it comes to their wellness program. Evaluation targets include things like participation, participant satisfaction, behavior modification, and cost containment.

WELCOA's Well Workplace model has been adopted by more than 1,000 companies across the U.S.



TEAMS

In This Issue of Absolute Advantage

In this issue of *Absolute Advantage*, we are concentrating our energy on illuminating the best practices of cohesive worksite wellness teams. Specifically we've identified the 10 secrets of successful worksite wellness teams as well as provided information on how your team can catch fire. To complete this issue, we've included an important case study and an insightful expert interview.



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WELCOA's Seven Benchmarks

This article has outlined in detail our approach to creating results-oriented workplace wellness programs. The information has been adopted and embraced by scores of companies throughout North America. By using this information in an organization or with your clients, you can provide a credible framework which can be understood and operationalized. If you have questions concerning the use of this information or how you can put it to work in your organization, contact WELCOA at wellworkplace@welcoa.org.



About The Wellness Council of America [WELCOA]



Based in Omaha, Nebraska, WELCOA was founded in 1987 as a national non-profit membership organization dedicated to promoting healthier life styles for all Americans, especially through health promotion initiatives at the worksite. Organizationally, WELCOA serves as an umbrella, linking communities and coalitions together into a supportive network that includes locally affiliated Wellness Councils, Well City initiatives, Well Workplaces, and individual and corporate members throughout the United States.

Working Well—Specifically, 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. To date, over 700 companies have received the prestigious Well Workplace award. In addition, nine cities have been designated as Well Cities—Jacksonville, FL; Omaha, NE; Chattanooga, TN; Hobart, IN; Lincoln, NE; Kearney, NE; Kanawha Valley, WV; and Gainesville, FL and Bangor, ME—while several other cities have made the commitment to join this exclusive group.

Leading Edge Wellness Information—In addition to helping organizations build structurally sound wellness programs, WELCOA serves as a national clearinghouse and information center on worksite wellness. WELCOA responds to thousands of requests for information and materials by publishing a number of source books, a monthly health and wellness newsletter, an extensive line of brochures, as well as conducting numerous training seminars.

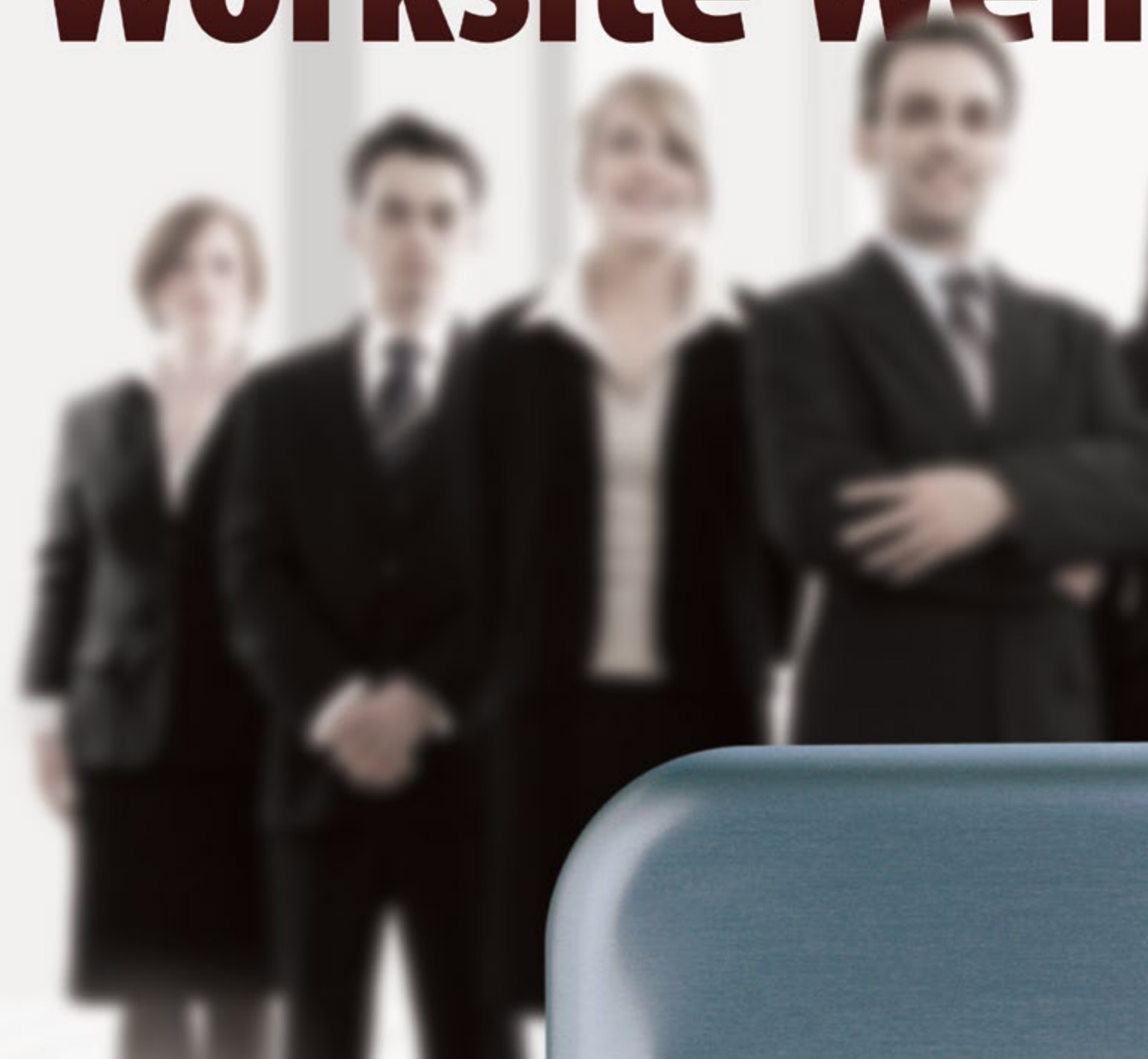
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The 10 Secrets Worksite Well



s Of Successful ness Teams

| By David Hunnicutt, PhD



**WELLNESS TEAM
CONFIDENTIAL**



When it comes to building results-oriented wellness programs, teams are a big part of the equation. In fact, teams comprise the second critical benchmark of success in the Well Workplace process. In this article, we'll share the 10 secrets of successful worksite wellness teams.

But before revealing these 10 secrets, it's important to discuss why teams are such an important part of the worksite wellness equation.

Built To Last

Several years ago, James Collins and Jerry Porras authored a best-selling business book entitled, *Built To Last*. In their book, Collins and Porras studied the characteristics of companies that enjoyed long histories—some more than 100 years. Interestingly, one of the key factors in companies that were literally “built to last,” was a reliance on teams rather than on individuals. Collins and Porras referred to the phenomenon of investing in teams rather than individuals as clock building versus time telling.

According to Collins and Porras, “Having a great idea, or being a charismatic visionary leader is ‘time telling’; building a company that can prosper far beyond the presence of any single leader and through multiple product lifecycles is ‘clock building.’”

Not surprisingly, we found that teams are also a critical part of the longevity factor in results-oriented worksite wellness programs. After studying successful wellness initiatives for the last 20 years, there's no question that the great ones rely heavily on teams.

The 10 Secrets Revealed

Secret #1: Team Members Are Formally Appointed

The first secret of successful worksite wellness teams is that team members are formally appointed to serve. This is in stark contrast to the idea that wellness teams are largely comprised of eager volunteers. Formal appointment most often occurs by the CEO or another senior executive. By formally appointing individuals, it is clear that the team is important and that members have definite roles and responsibilities.

To be sure, this type of appointment makes it clear that wellness is a key part of the strategic functioning of the organization and that those who serve are charged with overseeing the health and well-being of the employee population—despite any other priorities which may emerge. Indeed, when a company's wellness team is made up of volunteers, the wellness program can often fall to the wayside when other “more pressing” matters boil up. By formally appointing wellness team members this will never be the case.

It's also worth mentioning that while most people who are appointed to the wellness team are excited and eager to serve in this vital capacity, it's important to understand that this is not always the case. Indeed, it has been our experience that formal appointment sometimes means recruiting individuals who most likely would not have come forth voluntarily. Nevertheless, formal appointment is the first secret of any successful worksite wellness team.

Secret #2: Team Members Have Wellness Written Into Their Job Description

In addition to formal appointment, the second secret of successful wellness teams is that their members have health promotion responsibilities written into their job descriptions. In so doing, there is nothing left up to chance. Too many times, employee health and well-being falls to a lower priority when urgent organizational matters present themselves. We believe this should not be the case. In fact, we feel strongly that when pressing organizational matters emerge, employee health and wellness should still remain a fundamental priority for the organization.

For example, we have heard a number of horror stories where companies went through turbulent waters and, as a result, the wellness program was jettisoned. But isn't this the time that wellness is most needed within an organization? By having wellness responsibilities written into a team member's job description, there will be no possibility for confusion as to what the priority is at the individual or organizational level.

Please don't misunderstand the intent here. Our experience has been that successful wellness teams have members who have health promotion as a part of their job description. We are not implying that wellness team members need to have full-time responsibilities for wellness. They should however, have some part of their time allocated to protecting the health and well-being of the organization's most valuable asset.



Secret #3: The Wellness Team Is Promoted Throughout The Organization

The third secret of successful worksite wellness teams is that the group as a unit is widely promoted throughout the organization. This is important for several reasons. First, by promoting the wellness team, all employees will see that worksite wellness is an organizational priority—so much so that a team of people has been appointed to address this topic.

The second reason is so that employees will see that these individuals are there to help, support, and assist them—not identify the unhealthy so that they can be terminated. Effective promotion of the team ensures not only who serves, but what approaches the team is taking to advance health within the organization.

Finally, regular promotion of the wellness team is critical as it gives team members a sense of importance in that their roles are made known to the organization at large. This helps not only in keeping present members engaged, but also creating a desirable profile for others so that they may aspire to one day be appointed to this team.

By regularly and effectively promoting the wellness team, organizations can take enormous strides in ensuring that team members feel important and, at the same time, employees at all levels support and believe in the group's efforts.

Secret #4: The Wellness Team Has Strong Leadership

The fourth secret of successful wellness teams is strong leadership. In fact, in many instances, the quality of the team leader is often

the key ingredient in creating a healthy and functional team. Specifically, strong leadership is characterized by vision, energy, altruism, a spirit of inclusiveness, and a desire to help others.

Believe it or not, when it comes to developing an organizational wellness team, this is one ingredient that is routinely overlooked. In fact, we have witnessed serious struggles within organizations when leadership was not clearly established from the start. However, once this element was put into place, the team was able to work effectively and cohesively.

When looking for a team leader, it is important to note that the individual doesn't necessarily have to have a background in health. They must, however, be able to establish an agenda, manage a variety of different personalities, define priorities, meet goals and deadlines, motivate others, and communicate effectively with all of the organization's constituents.



Regular promotion of the wellness team is critical as it gives team members a sense of importance in that their roles are made known to the organization at large. This helps not only in keeping present members engaged, but also creating a desirable profile for others so that they may aspire to one day be appointed to this team.



Secret #5: The Wellness Team Includes People From Different Areas And Levels

The fifth secret of successful worksite wellness teams is diversity. By diversity, we mean that the team includes people from many different areas and levels throughout the organization. For example, it is important to have formal representation from core strategic areas such as human resources, benefits, safety, occupational health, finance, information systems, operations, and organized labor just to mention a few. To further encourage broader representation, many companies are choosing to include their insurance providers and benefits administrators as well.

In addition to having broad representation from various areas throughout the organization, it is also necessary to have individuals at all levels participate in wellness team functions. In fact, one of the biggest mistakes organizations make when it comes to wellness teams is that they only include executives from the upper echelon. In so doing, it creates an “us vs. them” impression whereby frontline employees think that wellness is only something reserved for the organization’s elite.

To counter this impression, it is vital that individuals from all levels be chosen to participate in wellness team functions. This means that frontline employees and senior executives will be seated next to each other as co-members of the organization’s wellness team. Oh, and by the way, it’s essential not to exclude middle managers as they are generally the catalyst to adoption.

It is also worth mentioning that it’s generally not a requirement that all members of the team be in perfect health. By including individuals of different health status, the organization takes important steps toward embracing individuals at all levels of the wellness continuum.

Before closing out this secret, we should take an opportunity to address a commonly asked question: “How big should the wellness team be?” Interestingly, there is no right answer to this question. However, we recommend that the wellness team be big enough to be representative of the organization as a whole, but small enough to be manageable. Specifically for large companies, it’s not uncommon to have wellness teams that range in size from 14-20. In smaller companies, four to seven will usually suffice.

Secret #6: The Wellness Team Meets Regularly

The sixth secret of successful worksite wellness teams is that they meet regularly. By regularly we mean monthly or bi-monthly. However, as the wellness imperative grows within an organization, it is not uncommon for teams to meet every other week. Although there is no set timeframe that will determine overall success, it has been our experience that teams that meet less than monthly generally have agendas that aren’t urgent and priorities that don’t get accomplished.

An interesting observation that has emerged in monitoring successful wellness teams is the reality that cohesive and well-functioning teams definitely have a rhythm. And this rhythm is established

and nurtured through regular face-to-face meetings. Certainly it is unreasonable to think that every team member will make it to every meeting. However, it is not unreasonable to think that the vast majority of team members will take part—especially if it’s written into their job descriptions.

Secret #7: The Wellness Team Has A Formal Agenda

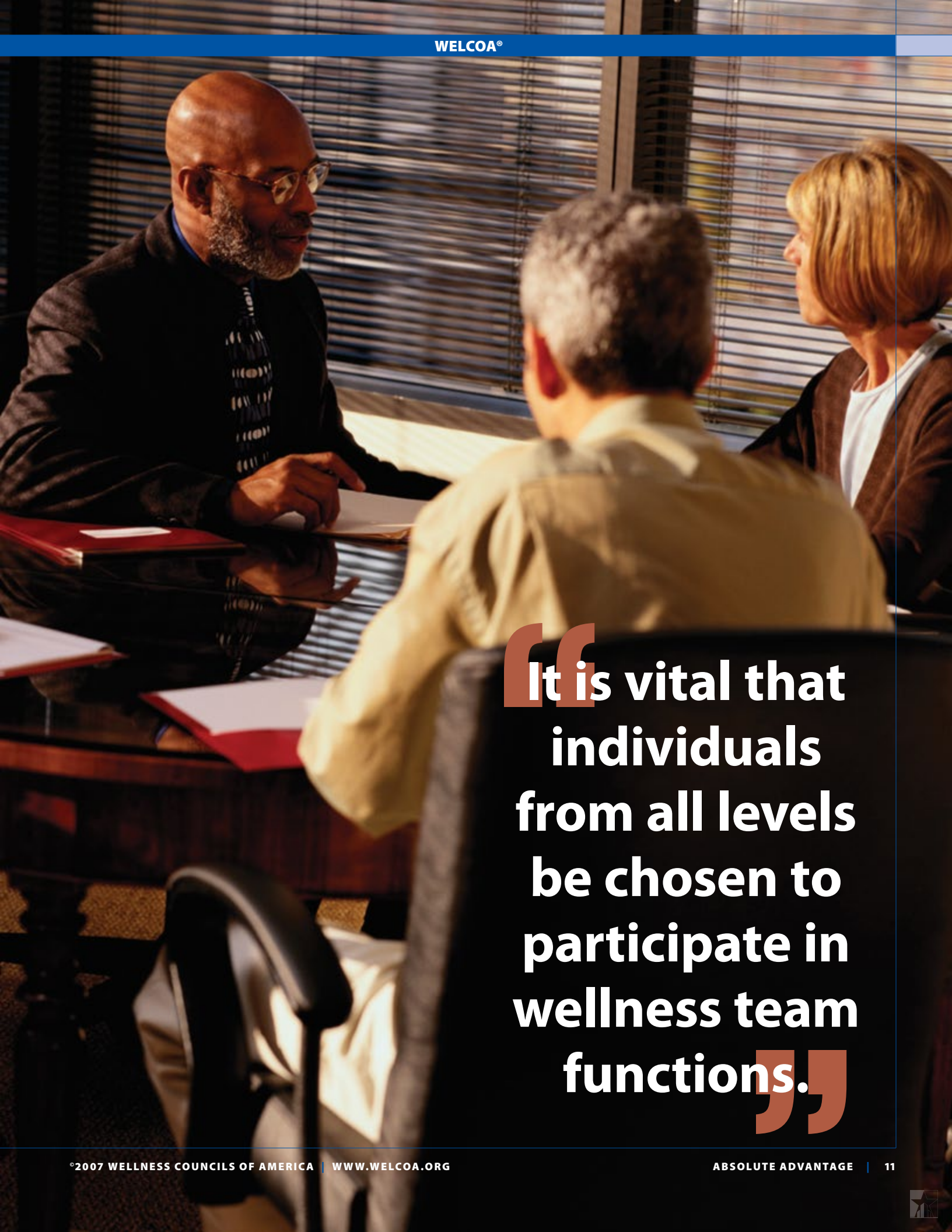
The seventh secret of successful worksite wellness teams is that they have formal agendas which drive their meetings. Plain and simple, agendas focus and clarify the group’s collective consciousness. Without an agenda, the team will struggle at some point in their existence and, more likely than not, team members will lose interest.

When establishing an agenda, it is important to make sure that all members of the team are at some point meaningfully involved in the execution of it. Without routine and regular involvement from all members, the team will struggle and could ultimately get sidetracked with personnel issues.

To be effective, the agenda should be developed well in advance of the upcoming meeting and circulated to each member ahead of time. This will allow team members to have time to review, prepare and think through each item before coming together.

Make no mistake; developing an agenda for each meeting is a critical part of the overall success of a results-oriented wellness team. And, by meeting regularly, agendas can be brief and manageable rather than bogged down with dozens of items and not enough time to get through them.





“It is vital that individuals from all levels be chosen to participate in wellness team functions.”



Secret #8: The Wellness Team Keeps Minutes

The eighth secret of successful worksite wellness teams is that they keep meeting minutes. To many, taking and managing minutes from the meeting often seems like a nuisance task. However, thoughtful minutes will be extremely useful to record and monitor the team's activity and progress.

Meeting minutes should be circulated shortly after the conclusion of the meeting, and also

should be representative of what happened during the team's time together. To be even more effective, some companies will send out the meeting minutes with the agenda for the next session.

In addition to providing a useful record of the team's progress, meeting minutes will be essential in the event of team turnover. In fact, without meeting minutes, new members will struggle to discern the team's position on wellness and its immediate and long-term priorities.

Secret #9: The Wellness Team Communicates Frequently

The ninth secret of successful worksite wellness teams is that they communicate

frequently. Remember, if established appropriately, the wellness team is the epicenter of health within the organization. By communicating frequently, the wellness team has a unique opportunity to educate and inform the rest of the organization about their health and the specific individual and company-wide priorities that surround this initiative.

Initially, it is not uncommon for wellness teams to spend time developing and communicating the organization's overall wellness philosophy. In addition, the team must communicate specific information as to how each and every employee can get involved. Many times teams overlook this basic approach to communication. In so doing, they severely



underestimate what it takes for people to embrace wellness within the organization. And without proper communication, the overall acceptance rate for wellness within the organization will remain low.

To counter this, successful wellness teams communicate frequently.

Secret #10: The Wellness Team Participates In Continuing Education

The final secret of successful worksite wellness teams is that they

participate in continuing education. Because team members come from many areas of the organization, it is important to think about a continuing education agenda. This agenda will ensure that team members are sufficiently educated with respect to worksite wellness and employee health improvement.

Ten years ago, this was a nightmare for existing wellness teams because continuing education opportunities did not exist. Today, much has changed, and continuing education opportunities are plentiful. Specifically, continuing education

opportunities can take the form of guest experts who present to team members. This is both a cost-efficient approach to continuing education and a great way to keep the wellness team meetings fresh and different.

In addition to in-service presentations, wellness teams can also attend conferences. Conferences may be local, regional, or national, and may encompass half-days, full-days, or multiple days. With the advancements in telecommunications, many teams have contracted with national experts to deliver important content via the phone and/or Internet—the learning takes place in the comfort of their own facilities.

It's also not uncommon for team members to receive subscriptions to wellness publications that can help them advance their understanding of workplace health and productivity management.

Whatever the form, it's critical that teams establish a learning agenda for all of their members if they expect to be successful.

The 10 Secrets

Worksite wellness initiatives can improve health and contain costs. However, in order to be effective, health and productivity management initiatives need to be built properly. At the core of the process is the idea of developing a cohesive team. By implementing the 10 suggestions highlighted in this article, you will take important strides to building a best-in-class wellness program. ★



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“By communicating frequently, the wellness team has a unique opportunity to educate and inform the rest of the organization about their health and the specific individual and company-wide priorities that surround this initiative.”



CATCH FIRE

Great Ideas For Infusing Energy And Commitment In Your Wellness Team

| By David Hunnicutt, PhD



It comes as no surprise that teams with great energy produce great results. Therefore, it makes a lot of sense to ensure that your wellness team is always pumped up. To do this, it requires some creativity and a little work. However, the payoff will be enormous—both in terms of improved morale for team members and improved health for all employees.

Have Your CEO Reinforce The Importance Of Your Wellness Initiative

If you really want to get things off to a fast start, invite your CEO—or most influential senior executive—to a wellness team meeting. At this meeting, this leader has the opportunity to talk about the impact wellness has on the organization and the essential importance of the success of the wellness team. If done right, this is guaranteed to get the blood flowing within your group.

One CEO who has done an exemplary job in this area is Al Emsch of West Virginia-based law firm, Jackson Kelly. As the key leader and visionary, Mr. Emsch has made it a priority to communicate regularly and publicly with not only the wellness team members, but the company as a whole. Speaking from personal experience, we can tell you that Mr. Emsch is energizing, committed, and passionate about wellness at Jackson Kelly. When you have a leader like this, it's hard not to get excited.

Develop A Team Name

I know that to many, this sounds a little hokey. To the contrary, team names can provide an important sense of identity both for team members and your company's employees. It's important that the team's name is consistent with the overall purpose of the wellness initiative. In addition, it's nice if the team's name is upbeat and energizing.

For example, several years ago we were consulting with an electric cooperative located in the great northwest. For those of you who may not know, rural electric cooperatives are the entities that maintain power in largely isolated areas. Interestingly, this co-op's wellness team was made up of mostly women even though the company was predominantly male. To create a team identity, team members appropriately named themselves the "Electri-Cuties." Enough said.

Invent A Team Vision Statement

As we have mentioned in many other articles, a vision statement is an essential part of the success equation. Indeed, the vision statement cleanly and clearly articulates the ultimate destination at which the team hopes to arrive. Remember, the vision statement is generally not a long document. Rather, it is a couple of sentences or at most a couple of paragraphs. Although vision statements are generally brief, they are powerful reminders and motivators.

A company that's done a great job with inventing a team vision statement is International Truck and Engine Corporation. Interestingly their program is known as Vital Lives and their vision statement is brief yet powerful: "To be smart, to be healthy, to be responsible, and to be safe." Obviously, this Fortune 500 giant gets it. For their efforts, the Vital Lives program has received WELCOA's Platinum Award.

Manufacture A Team Motto

Like the vision statement, the team motto is a simple statement that embodies what the group stands for. Again, in order to build a great team, it's important that you breathe life into the group as a whole. A great way to do this is by manufacturing a team motto. If you don't think that this is important, think about all of the great teams that know and repeatedly recite their team's motto each day—Semper Fi, get it?

One group that has manufactured a great motto is Blue Cross Blue Shield of Nebraska. As their team was developing and growing, the motto was simple: "Make the rest of your life, the best of your life."



Recruit New Team Members

There's no question that recruiting new team members can revitalize a stagnant group. If your wellness team is suffering from a sense of lethargy, it's time to recruit some new people. However, be warned that recruiting new individuals can be a two-edged sword. Recruit the right people and the team takes a huge step forward. Recruit the wrong people and pound another nail into the coffin.

One of the best ways to recruit new members is to think about the organization's informal leaders. Here's a way to get a better handle on this concept. Imagine that there were no titles and no hierarchy within your organization. Who would people naturally be drawn to? Who would be the personalities that they would follow? Who would people do their best work for? Once you've answered these questions, you've identified your next team members—close the deal.

Assess Individual Strengths

It's true that the team is a group. But that team is also made up of individuals. And it is these separate personalities that bring richness to the entity. If you really want to get a better handle on how your team can best perform, we suggest assessing individual strengths. In so doing, you will quantify and capture the precise individual and overall strengths that the team embodies.

A great tool to assess individual strengths is Gallup's StrengthsFinder™. The best-selling companion book entitled, *Now, Discover Your Strengths*, allows you to log on to a website and take an online questionnaire. This questionnaire is known internationally for its ability to capture an individual's strengths. If you haven't done this exercise before, you'll find it well worth your time, and it will make a world of difference in better understanding the diversity that exists within your wellness team.

A great tool to assess individual strengths is Gallup's StrengthsFinder™. The best-selling companion book entitled, *Now, Discover Your Strengths*, allows you to log on to a website and take an online questionnaire. This questionnaire is known internationally for its ability to capture an individual's strengths.



Set Goals

If you really want to energize a team, just set some goals. In essence, goals serve an important function in motivating a team to take action. If set appropriately, goals create a sense of energy that can magically draw team members toward their desired destination.

Many times the overall quality of the team's substance is measured by its BHAGs—Big, Hairy, Audacious Goals. No BHAGs, no movement. The key point here is to remember that goals can substantially improve a team's performance. If your team is struggling, you may want to pay particular attention to this area.

Publish A Team Newsletter

This is an idea that is catching on in many companies. Indeed, a team newsletter can not only help to keep a company informed about the tasks and activities of the wellness initiative, but it can also have a wonderful effect in creating a sense of energy for team members. When the newsletter is published and circulated, team members often feel a great sense of pride and importance. These sentiments are extremely important in keeping team members motivated.

Your team's wellness newsletter can be published in-house and it doesn't have to be done every month. However, it does need to be done routinely and it needs to be done well. We've seen companies create stories about the team's priorities, recent successes and upcoming events. In addition, the newsletter may feature a bio of a wellness team member—this will serve to create a sense of personality behind the publication. Be sure to include your vision statement, team motto, and feedback mechanisms in each addition.

Conduct A Team Retreat

Taking some time to getaway, recharge, and bond is a great way to energize your wellness team. Retreats can take several forms including: day-long getaways, overnight stays, and multiple-day events. Whatever form is right for your company's wellness team, it is important that retreats be done at least annually.

More and more companies are scheduling wellness retreats that coincide with local or national conferences. This just might be the ideal retreat scenario as team members are receiving intellectual stimulation from conference presenters and building bonds by spending important face-to-face time outside of the office setting.

Take A Team Photo

When it comes to photos, the old adage is true, "A picture is worth a thousand words." Team photos are essential in helping to promote the wellness team's brand and identity. Too many times people underestimate the power of photographs. In fact, it's been our experience with wellness programs that very few teams have done this. However, it is important in the overall scheme of things and can breathe life into team members.

Remember, team photos don't have to be boring. In fact, it's better if they're not. By involving all of your team members in the discussion, you can engage everyone and come up with unique and novel ways to showcase the uniqueness of your team.

Conduct A Team In-Service

Continuing education is a great way to reenergize your team—it's amazing to see the impact that skilled presenters can bring to the group setting. By conducting an in-service you are effectively filling the team's consciousness with new ideas. This by itself will stimulate discussion and get people's insides churning.

If there is anything we've learned about wellness teams, it's this: Choose your presenters (and topics) carefully. If the presenter is dynamic, charismatic, and relevant, the effect is profound. On the other hand, if the presenter (or topic) is a dud, your team will pay the price. Make sure that you get plenty of background materials and references before committing to any speaker.

What's perhaps most important about in-services is the "detox" process that follows the session. All too often, teams don't carve out any discussion time after the presenter leaves. As a result, the great ideas that were swimming around during the session are lost due to the simple fact that no time was set aside to bring these ideas to a boil.

Will Your Team Catch Fire?

The above suggestions will ignite sparks that can get your team moving in the right direction. Certainly it will take some doing on your end; however, if you can incorporate these ideas into the fabric of your wellness team, there will be no question that you and your team will be in a better place—and better able to serve the employees within your organization. ★



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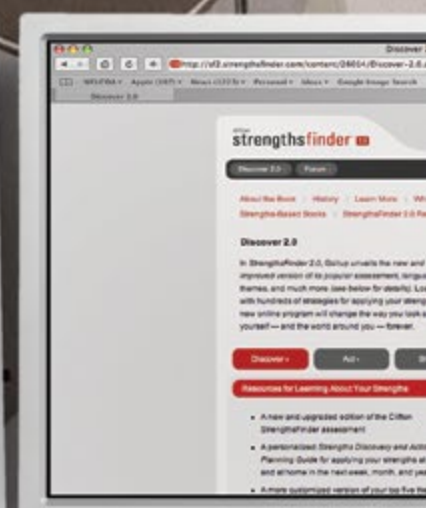
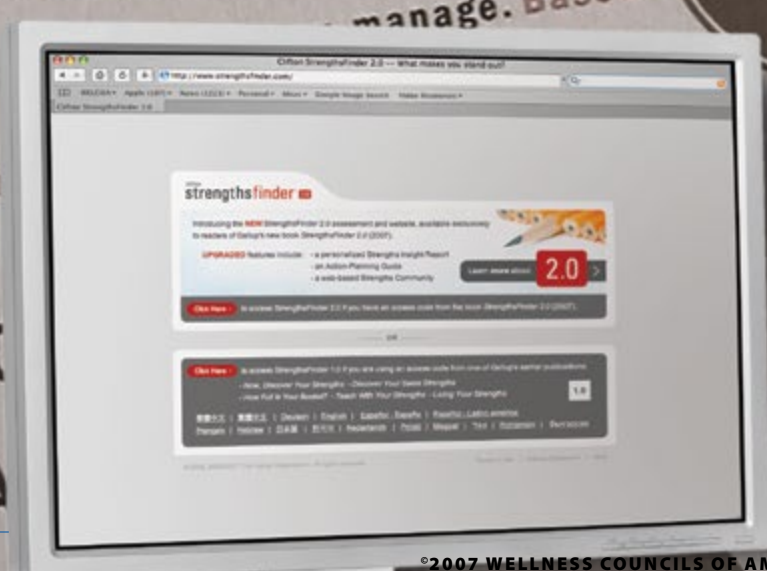


FROM THE COAUTHOR...
FIRST, BREAK ALL THE RULES...

NOW, DISCOVER YOUR STRENGTHS

The revolutionary program that shows you how
to develop your unique talents and strengths
—and those
on the Gallup
MARC
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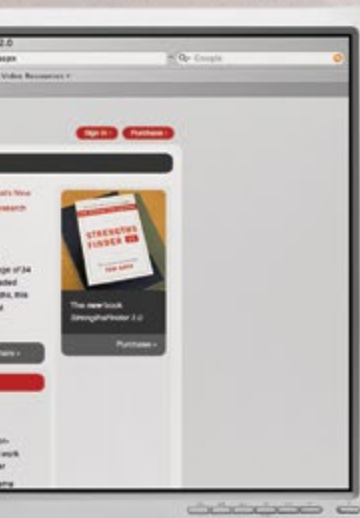
TAKE GALLUP'S
STRENGTHSFINDER.COM
PROFILE AND LEARN
YOUR TOP 5



Building Team Muscle

Pressing Individual Strengths to Develop
a More Effective Wellness Team

By David Hunnicutt, PhD



It's been said that there is no "I" in team. We disagree. After years of watching and evaluating effective wellness teams, it's clear that each individual's strengths help to bolster the overall make-up of the team. In this article, we'll present a great tool for assessing individual strengths as well as suggest ways of leveraging an individual's talents to help the team become stronger and more effective.

Introducing StrengthsFinder™

Let's begin with the tool itself. It's known as StrengthsFinder™, and it's put out by Gallup. Specifically, StrengthsFinder™ is a brief online assessment that has been extensively researched and validated by scientists at Gallup.

The experience begins by purchasing the book entitled, *Now, Discover Your Strengths*. It's available at major bookstores across the country as well as online at Amazon.com and retails for about \$30. Inside the book, there is a password that allows you to log on to www.strengthsfinder.com and complete the assessment.

The StrengthsFinder™ assessment will take you about 20-30 minutes to complete. Once you've finished, you'll be able to download a report that outlines your top five talents.

Armed with this information, you are now in a position to read and study the themes contained in the hardcover book.

The process is extremely straightforward and there's no question that obtaining this information is enlightening, intriguing and compelling.

Strengths...Not Weaknesses

The premise behind StrengthsFinder™ is that it's much more productive to nurture and leverage people's strengths rather than trying to shore up their weaknesses. Introduced about six years ago, this concept is rapidly gaining momentum. And when you think about it, it makes a lot of sense.

StrengthsFinder™ was originally developed by Gallup to be used by managers in an organizational setting. However, we've found it extremely useful when used with wellness teams.



Diversity, Diversity, Diversity

Using a very broad brush, it's possible to categorize people's talents and strengths into three general categories—thinkers, achievers, relaters.

Thinkers are those individuals that have been blessed with predominately intellectual talents and strengths. We all know people who are very cerebral and generally take a scholarly approach to events and matters. Certainly, thinking talents have an important place within a team setting as these are generally the people who bring things like theory, models, and quantitative measures to the table.

Achievers are those individuals that like to get things done. It's easy to identify achievers because they are the ones with the lists, and they don't feel like they've accomplished anything unless they get several items checked off each day. Achievers can play an important role within a team setting because they will help to bring projects and tasks to fruition.

Relaters are the charisma and “people” people. They draw their energy from human interaction. These kinds of people are naturally drawn to others and vice versa. Relaters can play a special role in the team setting as they are the ones who help to bring personality and cohesive gel to the table.

StrengthsFinder™ And Wellness Teams

We believe that StrengthsFinder™ can, and does, work wonderfully within a wellness team setting. By assessing individual strengths, the team is in a great position to examine its overall make-up within the broad categories of thinkers, achievers, and relaters. It's been our experience that many teams already have a wealth of talent from each of these three areas. However, by adding some definitive parameters, it lends itself to discussion about how the team can leverage each other's talents and maximize their time together.

On the other hand, it's also been our experience that many teams are radically lopsided. That is they have one group particularly well-represented. This can be a serious challenge and learning disability to the team. By taking StrengthsFinder™, wellness teams can see what areas need to be bolstered in order to increase effectiveness.

Check Out StrengthsFinder™

We highly recommend the StrengthsFinder™ tool. In fact, we've been using StrengthsFinder™ at WELCOA for a number of years now. It's allowed us to better understand our own strengths as well as the strengths of our teammates. As an organization, we've fully bought in to this concept, and it's paid big dividends for our company.

Moreover, Gallup is a world-class organization and the tool has been validated by some of the best research minds in the world. Given its widespread availability, it's easy to get your hands on the book and online assessment. Some have argued that the assessment is a bit pricey; however, our experience has been that the information gained far outweighs the expense. We strongly endorse this concept. ★



Complete the StrengthsFinder™ assessment tool, and you'll immediately receive your top five talents.



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When It Comes
To Wellness At
**Blue Cross Blue Shield
of Nebraska...**

It's All About Teams



Recently, Dr. Lee Handke, Vice President of Wellness at Blue Cross and Blue Shield of Nebraska sat down with WELCOA President Dr. David Hunnicutt to discuss BCBSNE's development of a best-in-class workplace wellness program. From the steps that Blue Cross and Blue Shield of Nebraska has taken, its clear that they have a healthy vision for the future.

Tell us a little bit about how the Wellness Initiative works at Blue Cross and Blue Shield of Nebraska (BCBSNE).

The first thing we did, David, was to try to understand where our baseline was. And, when I say baseline, I'm talking in terms of what are the unique health risks of our population, what are our employees interested in, and where are their health knowledge deficiencies that we thought we could address through worksite education programs.

In addition, we also wanted to know how our employees viewed BCBSNE as a company in terms of supporting them in pursuing healthy lifestyles.

Believe it or not, even though we had some "wellness" programs in place for quite some time, we really didn't have a concrete understanding where we stood in any of these areas. Without this information, we really couldn't

expect to create our own unique program to reach our potential.

What did you uncover from your data collection efforts?

Essentially, we found out that we were similar to other employers—we had some employees who were at low-risk, we had some at moderate-risk, and some at high-risk. Specifically, 21% were at low-risk, 68% at moderate-risk, and 11% were at high-risk.

We also learned that our employees lacked information about several important health issues. For example, in our knowledge survey, we found out that a high percentage of employees didn't understand nutritional recommendations, appropriate amounts of exercise, and healthy blood pressure and cholesterol levels. This was kind of surprising to me—maybe as a healthcare professional I took it for granted that everyone would know these things—the clear reality is that everyone doesn't.

Even though our employees carry health risks and didn't have a strong grasp on essential health knowledge, our interest survey uncovered the fact that they were highly interested in getting involved in a wellness program. In the interest survey, our employees told us they would participate in on-site screenings, weight management classes, exercise programs and healthy worksite food and vending options.

Did you find anything surprising from your health culture audit?

It was clear from the data that our employees didn't really feel supported in making healthy lifestyle changes. This was an eye-opener for our organization. I mean we had been doing wellness for some years. Despite our efforts, our employees weren't seeing our attempts at helping them manage and maintain their health at work. This told us that we needed to take our program to an entirely different level. And, communication was going to be key.

Once the data collection phase was complete, what was your next step?

The data led us to zero in on five different areas. The first area was defined as screenings. When we looked at our preventable healthcare claims, we noticed that our preventive services benefit was not being used by our employees. In fact, very few employees sought the proper screenings and physicals in accordance with age recommendations. So we thought, “Let’s focus on bringing those things into the worksite to make it more convenient.”

The second area of focus was environmental wellness, and this included everything from our on-site fitness centers to our cafeterias to our supportive health policies. While it was nice to have an on-site fitness facility, the equipment in the center was showing its age. While our on-site cafeterias had healthy options, unhealthy items were less expensive and highly consumed. Also, we had some work to do in terms of creating more supportive policies—especially with regard to our tobacco use policy.

The third area was communication/education—and, like the first two areas, this was driven by what we had learned from our employees in the data gathering phase. Because our employees’ understanding of critical health issues was not what it needed to be, we began to routinely distribute information through newsletters, brochures, Lunch ‘n Learns, posters and our corporate Intranet site called *InBlue*.

The fourth area was behavior modification. We wanted our employees to become active in making behavioral changes. These

Our employees didn’t really feel supported in making healthy lifestyle changes. This was an eye-opener for our organization...

...Despite our efforts, our employees weren’t seeing our attempts at helping them manage and maintain their health at work. This told us that we needed to take our program to an entirely different level. And, communication was going to be key.

—Lee Handke
Blue Cross Blue Shield of Nebraska

programs go beyond basic lunch ‘n learn type programs, and require indepth employee involvement to impact their health. To encourage involvement, we knew it would be important to properly incentivize employees and create team elements so we could all encourage each other. We feel strongly that behavioral modification programs will be key in keeping low-risk employees at low-risk and to help moderate- and high-risk employees to improve their health status.

Then the fifth and final area that we identified early on in our planning phase was community support. Obviously we’re a local company, with our market being the state of Nebraska. So we want to be strong advocates for health and wellness within Nebraska communities. So it’s looking at how we distribute sponsorship dollars to support community and statewide efforts of other organizations and bringing health and wellness opportunities to the communities that we serve. We strongly encourage our employees to get active in community-wide health offerings.

When you look at the data collection as the precursor to really implementing your program, how much time did you have to set aside to collect these forms of data and do a good job of analyzing it?

The data collection was fairly straightforward once we understood what needed to be done. Once this happened, things really fell into place. All in all, it took us about six months to administer the *Wellstream* health risk appraisal, survey our employees in terms of their knowledge and interests, and conduct a corporate health culture audit.

It was a busy six months, but we got it done on schedule. Our participation in the survey was 87%—so we were very confident that the data we received was a representative and accurate view from our employees.



How important has technology been in designing and delivering your program?

Technology is essential and, if used well, can really ease the administrative burden. In fact, if I could share one thing with other practitioners, it would be to integrate technology into the fabric of your wellness program and then work like mad to educate your employees on how to successfully use that technology to improve their health.

Rather than using paper, we post everything on our corporate Intranet called *InBlue*. Because BCBSNE has nearly 1,000 employees, it would have been logistically challenging to try to communicate and deliver our wellness initiative without leveraging technology.

In fact, our program has evolved so quickly because we have built a corporate health website where our employees can learn about our company wellness programs, read important health material, monitor their wellness incentive points, and ask questions of our staff. We contracted with HealthForce Partners out of Washington state to develop this site—we refer to it as our Wellness Challenge site.

However, it honestly did take some work to get this site designed and ultimately up and running. But, we took on this challenge of building a custom employee wellness website because we understood that we just couldn't buy something off the shelf and have it meet the needs of our particular workplace. So as a result, we were attracted to the flexibility offered by HealthForce Partners and we are really pleased with the outcome.

Bottom line, technology is a core component in our company wellness initiative, but it does take some work to get it fully integrated.

How have your employees responded to a high tech approach to worksite wellness?

Really well. We currently have about 950 employees and we had over 825 people log on to take the health risk assessment. In addition, we had another 735 individuals log on to our Wellness Challenge website to track points. From these numbers, it tells us that our employees are embracing the technology.

Did you use incentives to help your employees warm up to the idea of wellness and technology?

We did. And I'm very proud of the incentive program that we developed. In fact, this year we set \$90,000 aside for incentives. This budget includes things like gift certificates and merchandise, as well as cold hard cash. We've structured the current incentive program around "wellness credits"—with a total of 4,350 credits that an employee could achieve. Wellness credits are earned through a defined menu of wellness events and options. Anyone achieving at least 2,500 credits will get an end of year cash payout of either \$50, \$75 or \$100—as more credits are earned, the payout goes up. But, the bigger prizes will be awarded at the end of the year. There'll be four \$1,500 gift cards, and I think that's what's really getting people's attention.

Most importantly, we sought to make the challenge as fair to the "seasoned athlete" as the "couch potato" who may be engaging in healthy lifestyle options for the first time in many years.

It's also important to note that we really stress the fact that the biggest reward an employee will receive is better health. But I can tell you that our employees are definitely motivated by the dollars that we've set aside.

BCBSNE has one of the most supportive CEOs in the country. It must be nice having an advocate like Steve Martin in your corner.

If we didn't have the support that we have from Steve Martin at the CEO level, there is no way that our program would be at the level that we are today. His unwavering support is clear to me, and to our employees as well. Steve's supported us every step of the way, and he's truly interested in hearing first hand the things we have planned. Not only has he committed the resources to do this thing right, but he's also made it a point to communicate wellness throughout the organization. He's written it into the policy manual as well as the mission statement of the company. And if that's not enough, Steve has also made it a point to walk the talk. Recently, he put treadmills in an executive conference room where you can actually have a meeting and walk at the same time. This is a real testament to how committed Steve Martin is to promoting wellness at BCBSNE.





Lee J. Handke Speaks Out On...



The Importance of Wellness Teams

"Teams are a critical component of a results-oriented workplace wellness programs. Teams bring together multiple people with differing talents and perspectives within your organization. If you can engage a variety of people with different strengths, backgrounds, and experiences, you're bringing a lot of expertise to the table. This is what makes wellness teams so powerful."

Why Teams Create Long-Lasting Wellness Programs

"We refer to our wellness program as being "created by our employees for our employees." And in my opinion, that is one of key reasons our employees have been so engaged in wellness offerings. Who is better suited to know what will appeal to our workforce than a team made up of our employees? If you don't have a team in place, you are really putting all your eggs in one basket. You begin to rely on an individual, or outside entity, to create the wellness functions for your organization. From an engagement perspective, this is risky. You can also place too much responsibility on one individual's shoulders. Too many times wellness coordinators burn out because they don't have help or support. And when they leave, they'll take all of the program's experience with them. A broad-based, well-functioning team can help you avoid this scenario."

The Importance of Regular Team Meetings

"For teams to be functional and effective, they need to meet regularly. In my opinion, the frequency of meetings should be at least monthly, and more often in the early stages of your program. If team meetings are infrequent, people begin to lose their interest and enthusiasm, and become disenfranchised with the process. They'll also wrestle with establishing and maintaining strong ties with other wellness team members because they won't see them that often. When the program gains momentum and the team has been an integral part of it, you'll have the opposite problem—people will want to meet more often than you might anticipate."

The Importance of Team Leadership

"Teams function well when strong leadership support is in place. We learned this firsthand at Blue Cross Blue Shield of Nebraska. In fact, we have our Wellness Integration and Consumer Navigation (WIN) team that is comprised of five vice presidents, our wellness administrator, and our CFO. By having a senior level leadership team in place, it demonstrates that wellness is a priority within the organization. It also held my team accountable for the implementation of our operational plan, and ongoing reports of progress towards goals. Support from the highest levels is such an important component that I don't think you can neglect it."

Team Engagement in Strategy

"Our wellness team members are provided with educational opportunities and regular updates to our strategy. They had the opportunity to review and give input to our operational plan, and they remain educated and informed about the practices, strategies, and approaches of prevention and health promotion. They were directly responsible for choosing many of the partners we work with to provide onsite wellness programs. For example, last summer they interviewed several providers of smoking cessation programs, prior to implementation of our tobacco free campus policy. They selected a partner that they felt fit best for our employees, and the program was a big success."

The Team's Agenda

"Having an agenda and linking it to your operational plan is how you keep the team focused and engaged. If you don't have a specific destination in mind, your team members will pick up on it. And, as a result, there will be a lot of chaos. On the other hand, by having a well-thought out strategic plan, and a specific agenda for each team meeting, members will be able to see the destination and all of the mile-markers along the way."



BCBSNE Wellness Personnel

To develop a best-in-class wellness program, BCBSNE started at the top. Here's a quick summary of how they did it.

The first benchmark of a results-oriented wellness program is strong senior level support. It is well documented that change occurs when the CEO gets behind the wellness initiative. Steven Martin, CEO of BCBSNE, is a strong advocate for wellness programs and has allocated appropriate resources to assure that health promotion activities will be successful at BCBSNE. Mr. Martin has communicated his support to all senior management, and he will communicate his commitment to all employees as the wellness initiatives begin.

To expand on the senior level support of the programs, the Wellness Integration and Consumer Navigation (WIN) team has been organized to direct the strategic planning for Wellness Initiatives. The team is made up of the following individuals, representing a cross function of senior management across the company:

- ♥♥ **Dan Alm,**
VP, Marketing
- ♥♥ **Lew Trowbridge,**
CFO
- ♥♥ **Brian Pickering,**
VP, Marketing
- ♥♥ **Jerry Feilmeier,**
VP, Provider Relations
- ♥♥ **Lee Handke,**
VP, Health Service Programs
- ♥♥ **Sarah Waldman,**
VP, Human Relations
- ♥♥ **Roy Hunter,**
Wellness Administrator,
Health Service Programs

The WIN team serves as senior level advisors to give essential input during the development of the wellness strategy and the implementation of wellness programming. All major wellness strategic elements, including the overall strategy, will be presented to this team for input, modification and approval. This team will review the outcomes of wellness programming and oversee that appropriate modifications are made to optimize offerings to employees.

In addition to CEO support, you also have a wellness team that functions under the leadership of five of the organization's vice presidents. Tell us a little bit about how that team functions and the folks who are on it.

Actually there's two teams David. The first is our wellness committee which is made up of 22 representatives from a variety of areas within our company. Many of our best ideas come from this committee and as such, they are a

key component to the success of the corporate wellness strategy. They are a creative, and engaged team and our program would not be where it is today without their unwavering support for wellness which infuses our entire organization.

The other team, which you specifically asked about is the WIN Team—Wellness Integration and Consumer Navigation Team. The WIN Team is currently made up of five vice presidents, our Wellness Administrator, Roy Hunter, and our CFO, Lew Trowbridge, who is our executive sponsor. We meet on a monthly basis and we focus on strategic wellness issues as well as consumer navigation. To be sure, we've really focused more on wellness over the last year and a half

BCBSNE Wellness Team Members

A great wellness team has diversity through representation. BCBSNE's wellness team engages members from several critical areas within the organization.

DEPARTMENT

Corporate
Communications

Medicaid

Information
Services

Systems Analyst

Human Resources

Engineering

Customer Service

Graphics

Process
Management

Health Service
Programs

Food Service

Account Management





BCBSNE's wellness team is looking to elevate corporate culture from very good to great—employee health is a big part of the equation.

because it's been such a strong push here in our company to be seen as the leader in providing health and wellness solutions in our markets. But then again, if you think about it, the first aspect of consumerism is really wellness. Wellness helps individuals understand their unique risks so they can make positive lifestyle changes to minimize disease risk and feel energized and engaged.

When you look at the success of the WIN Team, it's really got Steve Martin's footprints all over it. Steve was insightful enough to make this team a priority within the organization and charge it with the responsibility of maintaining and improving the health and well-being of our workforce and the customers and communities we serve.

The team has been very important not only because of the strategic insights that they can offer, but it holds our wellness initiative accountable. The WIN team members want to see results and that creates some positive tension to help keep us on track.

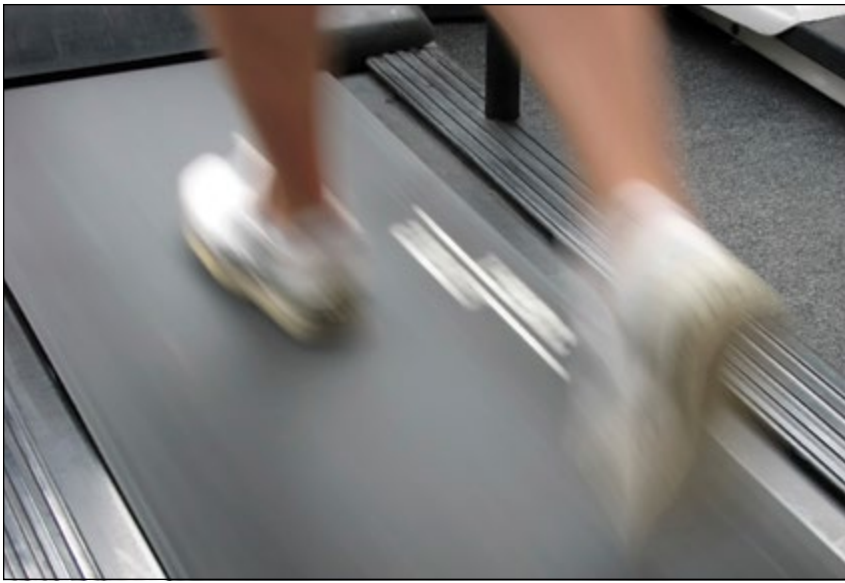
Lee, when you look at the program 10 years from now, what are you hoping to ultimately accomplish?

I think the biggest thing that we'd like to accomplish is to completely transform our culture. Don't get me wrong, BCBSNE has a great corporate culture, and our high employee engagement scores validate that. But when it comes to being

more supportive to employees' needs of being healthy, we can make some improvements. I think our wellness initiative will change the culture within BCBSNE for some time to come.

How will we know that the culture has changed? We'll know by our corporate health audit that we'll conduct annually. But we'll also know just by looking around. If we're successful in changing our culture we will see people in the fitness center throughout the day. We will see limited demand for unhealthy food options in our cafeteria. We will see employee meetings where high-fat or high-sugar foods are not offered. These things are already happening, and we know the program is making a difference.





If we didn't have the support that we have from Steve Martin at the CEO level, there is no way that our program would be at the level that we are today...

...And if that's not enough, Steve has also made it a point to walk the talk. Recently, he put treadmills in an executive conference room where you can actually have a meeting and walk at the same time. This is a real testament to how committed Steve Martin is to promoting wellness at BCBSNE.

**—Lee Handke
Blue Cross Blue Shield of Nebraska**

Finally, I hope we can validate and document the things that work well, so we can share this information with other employer groups looking to offer similar opportunities to their employees.

What's been the biggest challenge for you personally in launching the wellness program at BCBSNE?

The biggest challenge I still face is making sure that we can meet the demand. We're blessed to have Roy Hunter, who's our Wellness Administrator, and Kathy Nellor, who's our Wellness Coordinator. Both of these people are very charismatic and believe deeply in wellness. As a result, our employees are drawn to their positive energy and they've helped out tremendously. But we still have to be at the top of our game to make sure that there's plenty of room in the fitness center and that employees can take part in wellness programs without having to wait for a spot. I can give you several examples, but let me quote just a couple. Earlier in the year, we offered on-site aerobics classes, taught by Kathy Nellor and interns from the University of Nebraska at Omaha. We offered seven classes during the week and each class could have 20 participants. After posting the sign up, each class session had waiting lists of at least 40 people. Similarly, when we posted the sign up for the cholesterol screenings, all 450 slots were taken within a week of posting. We offered more screening days to meet the extra demand, and will expand our aerobic class offerings to 20 class sessions per week. So you can see, that I'm not kidding when I say that we're working hard to meet the demand, but it's a good problem to have!



When you think about all of the organizations that are looking to promote health within the walls of their company, what advice would you give other practitioners about getting the program up and running and making it successful?

I think the best answer to this question really revolves around WELCOA's Seven Benchmark model. Even though we knew a lot about workplace wellness, the Seven Benchmarks helped to organize our thinking and gave us a realistic blueprint to follow.

Of the Seven Benchmarks, CEO and senior leadership support has been key for us. And personally, I think it's essential to have CEO support. Each organization may need to use different methods to convince a CEO, CFO or other leader that wellness is a good idea—for some it's financial, while others focus on the effect on employee engagement or healthcare costs. But once they get behind the initiative, everything changes, and that's a very powerful thing.

The final piece of advice I would give to other practitioners is not to copy someone else's program or settle for an inflexible off-the-shelf solution. Every organization is unique and every employee population is different. If you follow the Seven Benchmarks, you'll create a program that's tailor-made for your organization...guaranteeing a perfect fit for your company's culture. ★

LEE J. HANDKE, Pharm.D., MBA



Lee Handke is the Vice President, Pharmacy and Wellness for Blue Cross and Blue Shield of Nebraska (BCBSNE) in Omaha, Nebraska. He is responsible for pharmacy trend

management and the development of corporate and community health promotion initiatives. Essential functions include coordination of activities with the plan's pharmacy benefit manager (Prime Therapeutics, Inc.), development and implementation of pharmacy utilization management programs, consultation with employer groups, oversight of formulary management activities, and the coordination of pharmaceutical research and analysis. He is an adjunct faculty member at the University of Nebraska Medical Center, College of Pharmacy, where he teaches in the managed care pharmacy curriculum and serves as a preceptor to pharmacy residents and students. Prior to joining BCBSNE, Lee was a Senior Clinical Pharmacist with Prime Therapeutics, Inc.

Lee received a Bachelor of Life Science from Kansas State University in 1993. In 1999, he graduated with distinction from the University of Nebraska Medical Center, College of Pharmacy with a Doctor of Pharmacy degree. Following graduation, he completed an ASHP/AMCP accredited residency in managed care pharmacy at Walgreens Health Initiatives in Deerfield, Illinois. Lee graduated with a Masters in Business Administration from the University of Nebraska at Omaha in May 2005.

Lee is a registered pharmacist in the states of Nebraska and Illinois. He is a member of many professional organizations including the American Society of Health-System Pharmacists, the Nebraska Pharmacists Association and the Academy of Managed Care Pharmacy. He lives in Omaha with his wife Jennifer and sons Peter and Zachary.



By improving employee health, BCBSNE looks to build its company's culture.



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WELCOA[®]



The JEA electric system currently serves more than 360,000 customers in Jacksonville, Florida and parts of three adjacent counties. JEA's water system serves more than 240,000 water customers and 186,000 sewer customers, or more than 80 percent of all water and sewer utility customers in our service area.

Electric System

JEA owns and operates three generating plants and all transmission and distribution facilities. A fourth power plant, the St. Johns River Power Park (SJRPP), is owned jointly by JEA and the Florida Power & Light Company (FPL) and operated by JEA. JEA and FPL are also joint owners of Unit 4 at Georgia Power Company's coal-fired Robert W. Scherer Plant (Plant Scherer), which is located in Macon, Georgia. JEA owns a 200 net megawatt share of Unit 4. JEA's ownership interest in Scherer is structured as a separate JEA bulk power supply system. In addition, JEA produces 3.2 megawatts from a methane-fueled generating facility at the Girvin Road Landfill. JEA's net generating capability is 2,361 megawatts.

Capacity expansion and renovation projects demonstrate JEA's commitment to environmental leadership, fuel diversification and rate stability. JEA's newest generating facility is Brandy Branch, located in west Jacksonville, home to three 170 megawatt combustion turbine units. These units are capable of operating on both natural gas and diesel fuel. Units 1 and 2 went into commercial operation May 31, 2001, followed by Unit 3 on October 12, 2001.

The Northside Generating Station Repowering Project made Jacksonville home to two of the largest circulating fluidized bed combustors, or CFBs, in the world. These CFBs produce nearly 300 megawatts each and utilize coal and petroleum coke as fuels.

Water & Sewer Systems

JEA's Water System consists of 150 artesian wells tapping the Floridian Aquifer, which is one of the world's most productive aquifers. Water is distributed through 44 water treatment plants and 3,480 miles of water lines. More than 2,500 miles of collection lines and six regional sewer treatment plants comprise the JEA sewer system.

JEA is committed to improving water quality of the St. Johns River. One outstanding example of how we're working to meet our goal to reduce nitrogen release into the river is through the use of reclaimed water for irrigation.

The Energy Authority

JEA is also a founding member of The Energy Authority (TEA), which was created in August 1997 to represent its member utilities in the sale and purchase of wholesale electricity. Today, TEA membership consists of 11 public power utilities in seven states.

Water & Sewer Expansion Authority

The Water and Sewer Expansion Authority was established in 2003 for the purpose of addressing challenges experienced by the approximately 175,000 homeowners dependent upon septic systems in connecting to municipal water and sewer. Many of these septic systems are aged and failing, which not only causes difficulties for homeowners in those areas, but presents environmental challenges to Duval County creeks and waterways.

Since JEA does not fund water and sewer neighborhood infrastructure in neighborhoods, many communities without public water or sewer lines find it difficult to get the needed property owner commitment to pay for new infrastructure because of the cost. The WSEA will offer an alternative for financing an approved neighborhood infrastructure project by allowing the capital costs to be financed over a number of years through an additional capital charge on monthly utility billings.

JEA will support the WSEA with nearly full utility services including capital project management, purchasing, billing, customer service, operations and maintenance and some accounting and finance support on a contractual basis.



JEA's Business Context And Background

JEA owns, operates and manages the electric system originally established by the City of Jacksonville in 1895. For more than a century, JEA has kept pace with the growth and development of the Jacksonville community.

Electrical service began as a department of city government at the Main Street Power Plant. Recovery activity in the years following the Great Jacksonville Fire of 1901, which destroyed most of the downtown area, stimulated the city's growth and the demand for more electricity. The Talleyrand Avenue Light Plant, opened in 1912, was expanded to carry Jacksonville through the land boom of the 1920's and supported America's defense efforts during World Wars I and II by delivering power to local shipbuilding industries and military installations.

Postwar expansion and the changing needs of the community led to the construction of the Southside Generating Station in 1950, followed by the addition of the Northside Generating Station in 1966.

The utility became an independent agency named the Jacksonville Electric Authority in October 1968, created by the consolidation of city and county governments. The energy crisis of the 1970's led JEA to initiate a comprehensive fuel diversification program to lessen its dependency on oil. What followed were the construction of two major transmission lines and the St. Johns River Power Park, a joint venture project with the Florida Power & Light Company. The success of these initiatives helped JEA lower and maintain electric rates that are, even today, among the lowest in the nation.

On June 1, 1997, the water and sewer systems operated by the city since 1880 also became part of JEA's utility service offerings. In 1998, an amendment to the JEA charter changed the name from the Jacksonville Electric Authority to the well-known acronym, "JEA." This change affirmed JEA's status in the community as an integrated utility provider while preserving a connection to our history.

Today, JEA is the largest community-owned utility in Florida and the eighth largest in the U.S. JEA's commitment to serving the community has united the business for 110 years, from the lighting of Main Street on March 7, 1895, to joining forces with the rest of the community to host Super Bowl XXXIX on February 6, 2005.

Vision/Mission Statement

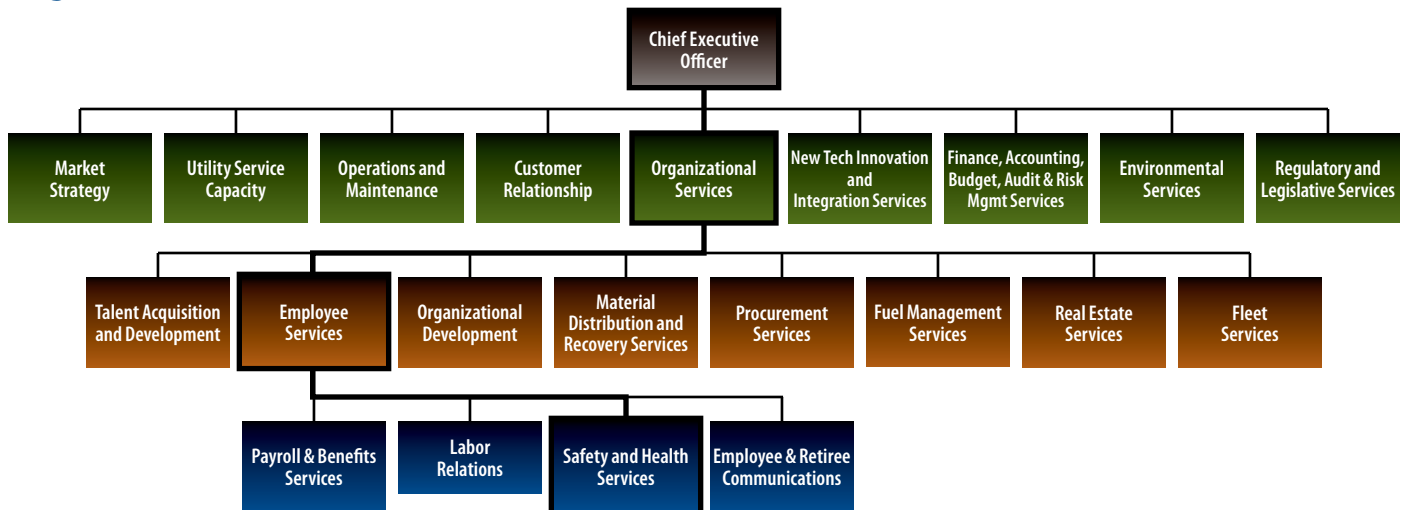
JEA's mission statement is: "To improve the quality of life in the communities we serve by being the best electric, water, and sewer utility in the nation." To be successful, we believe that our actions must support our mission. To this end, JEA has developed five strategies to fulfill the Mission, which reaffirms a commitment to customers and the community. They are:

- **Operational Excellence.** JEA will focus on operational excellence to energize our workforce, to improve financial performance, to maximize asset, system, and process performance, to manage risk, and to standardize a corporate decision-making framework.
- **Reliability from the Customer Perspective.** JEA will consistently deliver products and services that meet or exceed customer expectations.
- **Community Growth.** JEA will provide utility infrastructure support of community growth, economic development and urban redevelopment through strategic cooperation with all key stakeholders in a way that protects the environment and results in affordable, equitable rates for our customers.
- **Environmental Stewardship.** JEA will demonstrate environmental leadership by promoting conservation and pollution prevention programs and by undertaking specific initiatives that exceed the requirements of targeted environmental laws and regulations.
- **Strategic Partnerships.** JEA will seek opportunities to develop and leverage relationships and partnerships to benefit JEA, our customers, and our stakeholders.

JEA is recognized as a premier utility for supplying safe and reliable utility services to the greater Jacksonville area. JEA's tag line is "Building Community" and the many charitable endeavors demonstrate JEA's commitment to improving the quality life within the community. JEA has earned a reputation as a community leader by being stewards of the environment as a part of their work practices.



Organizational Chart



Organizational Services And Traits

JEA is a community-owned utility system serving Jacksonville, Florida, and portions of three adjacent counties. The electric system currently serves more than 360,000 customers. JEA's water system serves more than 240,000 water customers and 186,000 sewer customers, or more than 80 percent of all customers in the service area.

JEA owns and operates two generating plants and all transmission and distribution facilities. In joint ownership with the Florida Power & Light Company, JEA operates the St. Johns River Power Park (SJRPP), and owns a 200 net megawatt share of Unit 4 at Georgia Power Company's coal-fired Robert W. Scherer Plant, located in Macon, Georgia. JEA produces 3.2 megawatts from a methane-fueled generating facility at the Girvin Road Landfill. JEA's net generating capability is 2,361 megawatts.

JEA is committed to environmental leadership, fuel diversification, and rate stability, which is demonstrated by capacity expansion and renovation projects. JEA's newest generating facility is Brandy Branch, home to three 170 megawatt combustion turbine units. These units are capable of operating on both natural gas and diesel fuel. The Northside Generating Station Repowering Project made Jacksonville home to two of the largest circulating fluidized bed combustors, or CFBs, in the world. These CFBs produce nearly 300 megawatts each and utilize coal and petroleum coke as fuels.

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Improving water quality of the St. Johns River, a vital community resource, is one aspect of JEA's pledge to operate utility services in an environmentally safe manner. One outstanding example of how JEA is working to meet a goal to reduce nitrogen releases into the river is through the use of reclaimed water for irrigation. Not only has JEA accomplished this goal, but as part of the process, it preserves much of the precious fresh water supply of the Florida Aquifer.

JEA's governing body consists of a seven-member Board of Directors appointed by the Mayor and confirmed by the City Council. JEA is not subject to state regulation, except for certain environmental and health matters, power plant location, electric safety and electric rate structure matters.

Present Competitive Position Within The Industry

Each year, JEA surveys 3,200 residential and 1,600 commercial and industrial customers. In 2004, JEA reached an all time high in customer satisfaction on our residential transaction survey. JEA also compares itself to other regional electrical and water and sewer utilities. This process is measured by the American Customer Satisfaction Index. In 2004, JEA was number one in water and sewer residential quality of service and second in electric commercial and industrial quality of electrical service.

JEA earned the American Public Power Association's (APPA) 2004 Electric Utility Safety Award. JEA placed third in the largest category of the national contest for safe operating practices. JEA has won similar awards from the APPA in 2001 and 2002.



Core Values

Doing The Right Thing

- ◆ *We balance the needs of employees, customers, and other stakeholders for the overall good of the company and the community.*
- ◆ *We make decisions that are consistent with our core values, mission, and strategy.*
- ◆ *We proactively respond to the needs of our stakeholders with competence and creativity.*
- ◆ *We provide significant value to the City of Jacksonville and the communities we serve.*
- ◆ *We conduct our business with integrity.*
- ◆ *We protect and enhance the environment.*

Personal Safety, Well-being And Development

- ◆ *We care about each other and acknowledge one another's needs.*
- ◆ *We invest in the career and personal development of all employees.*
- ◆ *We recognize and reward excellence and celebrate success.*
- ◆ *We promote a work environment that fosters teamwork and engages our employees.*
- ◆ *We have fun and encourage balance in our lives.*
- ◆ *We create a corporate culture that embraces personal safety and health.*

Personal Integrity

- ◆ *We treat one another with dignity and respect.*
- ◆ *We communicate openly and share frequent and candid feedback.*
- ◆ *We are personally accountable and expect the very best from each other.*
- ◆ *We are reliable and dependable.*



Operational Excellence

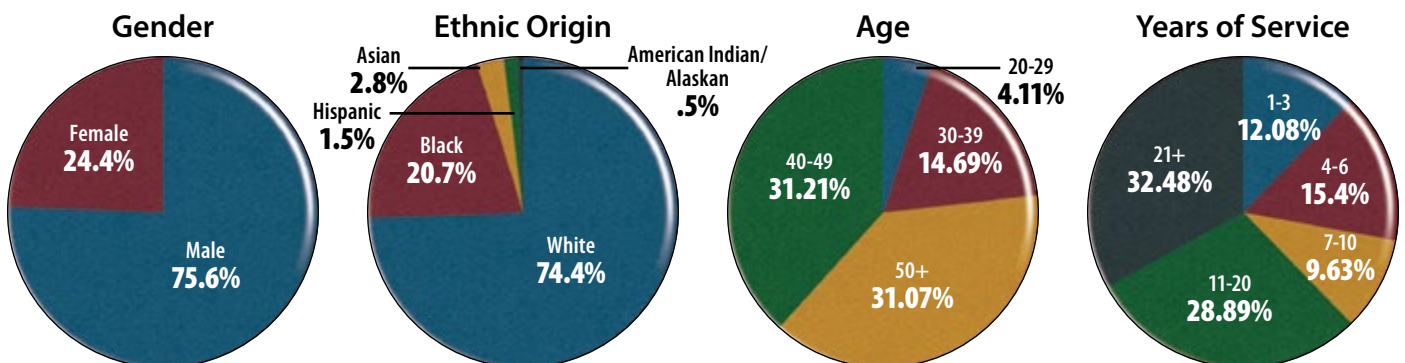
- ◆ *We develop and implement creative and innovative solutions.*
- ◆ *We lead our industry by regularly challenging ourselves to find a better way.*
- ◆ *We are data-driven and continually seek to reduce cycle time, improve quality, and lower costs.*

Challenges To The Organization

The biggest challenge for the utility industry is rising fuel costs. JEA made the strategic decision during the oil crisis days of the late 1970s and early 1980s to diversify its fuel sources. This decision has benefited Jacksonville today in that, although all fuel prices are on the rise, JEA can utilize some of the least expensive fuel available and still stay within the goal to be “better than mandated” on environmental regulations.

Florida experienced the worst hurricane season ever in 2004. Many equipment and system improvements have been made since then in preparation for a storm season that is predicted to be as active as last year. JEA will utilize a dedicated work force and a well-executed system restoration plan to help restore service quickly and safely in the event of major storms.

Demographic Overview



JEA's Present Approach To Corporate Health

JEA's wellness program has been in place for 17 years. A grass roots movement by an employee group in 1989 was the initial catalyst for starting a wellness program at JEA. In 1991, the same group joined the Wellness Council and presented the information they learned about the corporate advantage of wellness to management. From there, a team was formed under Employee Benefits with the responsibility to integrate the well workplace model into JEA's corporate structure. The team called the wellness program Life Force and the apple was their identifying signature. JEA earned the Bronze Well Workplace award in 1995, Silver Well Workplace in 1996 and the Gold Well Workplace in 1999.

In 1999, JEA reorganized and health and wellness was formally recognized and moved into the Safety and Health Promotion Department. With a dedicated staff and budget, the program was able to grow exponentially. The health promotion program took on a new image and logo called *Health Works*, Programs that Benefit Your Life. The department has since been re-named Safety & Health Services (S&HS) to identify a broader scope of services provided within JEA. JEA was recertified as a Gold Well Workplace in 2001.

Corporate Wellness Vision And Mission Statements

Vision: JEA Health Works will assist employees, retirees and their family members to develop and maintain their optimal health status, improve their quality of life and perform at their maximum capability.

Mission: Safety & Health Services Department has the overall responsibility to identify, develop, promote, implement, and evaluate the health promotion program for JEA employees, retirees and their family members. The Wellness Work Force team and the SHAPE Representatives will assist the safety and health team in reaching these goals.

Goals & Strategic Initiatives (Condensed)

- ◆ Evaluate needs assessments, data, and surveys to identify and prioritize needs
- ◆ Form partnerships with external resources to network, take advantage of outside opportunities, share information, pool resources and learn best practices
- ◆ Develop an annual operating plan using Well Workplace guidelines
- ◆ Choose interventions in levels of awareness, education and behavioral change

- ◆ Implement, administer and evaluate the health promotion program

Wellness Work Force—Mission

The mission of the Wellness Work Force is to create a culture of wellness within JEA which results in a continually measurable improvement in healthy lifestyles.

Wellness Work Force—Initiatives (Condensed)

- ◆ Support and assist in planning and implementing health and wellness activities
- ◆ Actively promote healthy and safe behaviors within the company work centers by way of providing information and motivation to co-workers
- ◆ Distribute and display information on health related topics
- ◆ Collect data on ongoing health and wellness projects and activities

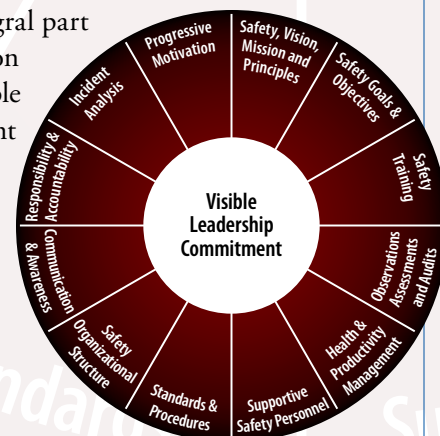
Wellness And Strategic Priorities Of The Organization

Integrated Path:

1. The *JEA Way* provides the strategic path that encompasses *Operational Excellence*.
2. *Operational Excellence* focuses on the JEA *Workforce* through the core value entitled *Personal Safety, Well-being and Development*.
3. Within *Personal Safety, Well-being and Development*, "We create a **corporate culture** that embraces personal safety and health."
4. The **corporate culture** is addressed through the *13 Elements of Safety*.
5. One of the *13 Elements of Safety* is *Health and Productivity Management* which is achieved through the *Health Works* initiatives.

JEA's 13 Elements Of Safety

Each element is an integral part of supporting the mission and vision of JEA. Visible Leadership Commitment is the central element for all the others and demonstrates the dedication of JEA's management to the safety and wellness initiatives.



The Operating Model And Theoretical Underpinnings For The Wellness Initiative

The primary operating model for JEA's *Health Works* program is the *Well Workplace Seven Benchmarks of Success*.

- 1. Senior Level Support.** Support is demonstrated by JEA's Managers and Senior Executives through leadership by example, budgetary support, strategic planning and allowing the workforce to participate in wellness activities on company time.
- 2. Cohesive Wellness Teams.** JEA has two teams: (1) Wellness Work Force, a specific team committed to supporting wellness efforts and (2) SHAPE (Safety & Health Awareness Promotion and Education) Representatives. SHAPE Representatives are a volunteer group of 250 employees from all areas of JEA who have a portion of their job tasks assigned to advancing health and safety within JEA.
- 3. Collecting Data.** Data collection and analysis are used for needs assessments, pre-planning, implementation, evaluation, feedback and programming selection.
- 4. Operating Plan.** Use of the annual operating plan increases the efficiency and effectiveness of JEA's *Health Works* program. The data from analysis is used to develop SMART goals with a timeline and marketing plan for each successive year.
- 5. Appropriate Interventions.** JEA balances the need of the company for a productive, healthy workforce with the interests of the employees. Data analysis and benchmarking are used to choose the correct interventions to effectively support the needs of JEA's population.
- 6. Creating a Supporting Environment.** JEA has company policies, procedures and benefits that promote healthy lifestyles. New employees learn about these in *New Employee Orientation*. Also, a weekly e-mail titled *Wellness Wednesday* updates all employees on current wellness offerings. Two significant incentive programs (*Annual Achievement Award* and *Passport to Safety*) reward positive behaviors in health and safety.
- 7. Consistently Evaluating Outcomes.** JEA uses Six Sigma methods and evaluation tools to measure progress and success of the wellness program. Results of evaluations are used to identify optimal use of resources, for process improvement, and to determine the best methods that can be repeated for long-term success.

Wellness interventions are rooted in evidence-based theory and practices from the Health Belief Model, Transtheoretical Model (Stages of Change), Social Learning Theory, Social Cognitive Theory and Social Marketing Theory.

Using concepts from the Stages of Change Model, interventions are designed to reach participants in their current stage and help employees progress to later stages. Examples: (1) *The Preparing to Quit* smoking cessation class reaches those who are thinking about change, preparing for change and those ready to change. By not requiring participants to quit smoking to attend the class, participation has increased. (2) Questions on the annual HRA assess the JEA population's readiness to change related to six selected health behaviors. JEA *Health Works* uses this information to determine correct programming and timing of events.

The social theories show that external support helps individuals succeed in their health goals. *Health Works* uses those methods as the basis for interventions that encourage using work-out partners; to involve family and friends in the process; and, in activities that initiate competitions between work locations. JEA uses social marketing techniques by providing different types of communications to reach various groups within the population. JEA *Health Works* also provides incentives for individual events to increase interest and reward positive behaviors.

Theories from the Health Belief model help JEA reach an aging employee population. By educating employees about increased health risks related to age, employees can accurately assess individual risk. Employees also learn how to lower risk levels and associate the health benefits gained by making behavioral changes. Self-efficacy skills are utilized in activities that set challenging, yet attainable, goals. As participants complete small steps that build on each other, they gain confidence while continuing on the way to reaching larger goals.

Health Behaviors Within The Organization

Physical Activity—JEA has seven on-site fitness centers. These centers are an innovative partnership between the company and employees and provide a low-cost, convenient way to become physically fit. JEA provides the space, security and cleanup, while the employees own the equipment, choose the program options and secure the insurance. Membership is a one time \$35 fee and \$10 per month.



Other activities to help JEA's population stay active are: (a) *Walking Works*, a walking program with pedometers, (b) *Industrial Athlete*, a daily stretching program that allows employees company time to stretch three times per day, and (c) *Healthy Passport Lifestyles*, an exercise program that tracks an individual's amount of exercise and food consumption.

Healthy Eating and Weight Management—JEA was chosen by GlaxoSmithKline and the WCOFL to pilot the workplace component of a 12-month community-wide program called *The Health Series*. The program was designed to motivate and empower employees to make lifestyle changes for better nutrition, weight management and increased physical activity. Components included an HRA for baseline measures, six interactive lunch-n-learns, and *Health e Strategies*, an interactive on-line learning tool. The health topics presented at work were repeated on a local television station as public service announcements. The dual presentation method was intended as a way to influence employee health behavior from multiple approaches. Additional programs offered are: (a) Weight Watchers at Work, (b) quarterly health topics, (c) health video and book library, (d) hypnosis sessions, and (e) *Scaling Back*, a weekly weigh-in and health education program.

Reduce or Eliminate Tobacco Use—Smoking cessation activities include: (a) *Quit Smart*, a four-week behavioral change course from Duke University, (b) the *Florida Quitline*, a telephonic education counseling program, (c) hypnosis sessions and (d) resources from the JEA *Wellness Library* such as books, literature, video and audiotapes.

Depression and Stress Management—(a) A full range of Employee Assistance Program services provide free counseling to help employees, retirees and their family members. Services assist in decreasing stress and depression as it relates to family matters, alcohol use, drug abuse, or other issues. A 24-hour help line is provided for crisis situations. (b) Hypnosis sessions for stress and weight management were combined to form a unique program that is offered at six on-site locations quarterly. (c) Financial planning seminars for budgeting, investing, deferred compensation and college savings plans are offered to reduce money concerns. (d) On-site chair massage.

JEA's Most Innovative Approach

The *Passport to Safety* program is a creative approach to improve safety and health that has increased participation in wellness events and lowered JEA's injuries. This voluntary incentive program is designed to proactively affect JEA's culture by influencing employees to actively participate in the daily practice of health and safety.

JEA employees earn passport points by performing safety and health tasks beyond their normal work duties. An incentive is provided for individual and group efforts. This encourages employees to care about the safety and health of themselves and the behaviors and actions of their co-workers. Ninety-eight percent of the workforce participates in the *Passport to Safety* program.

In the first year of implementing the *Passport to Safety* program (2004), participation in all wellness events significantly increased. Compared to 2003 participation levels, participation in flu shots increased by 44%; participation in Health and Lifestyle Assessments (annual HRA and biometric testing), increased by 36%; and participation in ultrasound screenings increased by 28%. Equally significant results were seen in employee safety for the first year.

Safety Improvement From 1st Year Of Passport Program	FY 04	FY 03
Reduction in Number Accidents (43%)	47 injuries	83 injuries
Reduction in lost time cases (29%)	0.62 cases	0.87 cases
Reduction in lost time days (83%)	8.49 days	50.15 days

Making Strategic Health Decisions

Major Accounts Performance Report from Blue Cross is a detailed report that provides population data for our employee, retiree and dependant populations in reference to their medical care utilization and medical care claims.

Health Risk Appraisal (HRA), with biometric testing, is a population based assessment conducted to identify health data for JEA employees, retirees and their dependents. The report's aggregate results provide an annual snapshot of the population's health status.

Wellness Inventory Survey measures absenteeism and presenteeism rates of the employee population for 11 different health conditions and four caregiver health conditions.

Marsh & McLennan Plan Summary Report provides a summary of utilization rates for high cost claims, prescription drug expenses, types of services, and DRG groupings.

Safety Metrics, Compliance Medical Testing and Workers Compensation data provides data trending for incidents and near misses based on regulatory requirements.

Other data sources include: short and long term disability claims, employee benefits usage, family medical leave usage, participant evaluations, annual Needs and Interest Survey, and formal and informal feedback.



Addressing At-Risk Populations

Formal Study with Pfizer—JEA is currently piloting a formal study to help participant's lower blood pressure and cholesterol. It is a six-month project that includes testing, educational seminars and counseling for participants who test outside of the normal limits for blood pressure and cholesterol. At the end of six months, participants' biometric testing results and utilization of medical services is measured against those in the control group. Anecdotal results show that the program is successful. Data analysis from this program is not yet completed.

Disease Management Programs—disease management programs are available for diabetes, asthma, and congestive heart failure. These programs provide one-on-one attention to help participants understand their condition, identify treatment options, and lifestyle modification methods for improved control and disease management. Additional education, home-mailings, and follow-up are provided for ongoing support.

Case Management Services—provided by Blue Cross to Plan members with multiple risk factors or diseases that lead to debilitating or chronic conditions. The service focuses on collaboration with the member, their families and physician to assist the member in managing personal health conditions and lowering risk levels.

Health Coaching with "Health Dialog"—provides 24/7 access to a personal health coach. The coaching concept encourages ongoing one-on-one dialog with members for long-term support to improve their health and get answers to their health questions. An on-line component ensures access to accurate health information on a multitude of topics.

Employee Assistance Program—professional counseling services for employees and families to help resolve problems before they become a threat to health, family or job.

Treatment for Depression—a specialized program to treat people with depression through the Mental Health Network, which can be accessed directly without a physician's referral.

Keeping Low Risk Populations At Low Risk

On Site Medical Clinic—JEA's medical clinic provides regulatory compliance testing; OSHA physicals, audiometric testing, respiratory and fit test assessments, drug testing, and pre-employment physicals. The clinic also provides first-aid treatment, lab and x-ray diagnostics, and routine assessments. The clinic is certified as a

network Workers' Compensation provider by the State of Florida and provides a convenient, cost-effective means for processing JEA's Workers' Compensation cases. The clinic's PA augments the wellness program by providing educational sessions on health topics during site safety meetings, followed by one-on-one, "Ask the Doc" sessions. The current topics covered in safety meetings are back care, skin cancer and heat stress prevention, and prostate cancer awareness.

JEA continuously monitors the population's health status through regulatory testing and wellness screenings. In this way, JEA is able to track the health status of low-risk employees and identify risk factors early to provide intervention. By building our medical clinic on JEA property and bringing the wellness activities to multiple work locations, JEA has been able to increase efficiency and decrease time away from work, thereby increasing productivity.

Other methods include—Health components built into *Safety Focus Month* (an organized interactive campaign focused on improving health and safety), *Industrial Athlete* (daily stretching program to prevent injury), *Grab & Go* (health literature distributed to 33 work centers), ergonomic strategies (methods to prevent repetitive motion injuries), fitness centers, health fairs, and lunchtime learning educational seminars. In addition, *Blue Complements* provides discount options for community fitness center memberships, massage therapy, acupuncture, smoking cessation, stress management, and laser vision surgery. Using a holistic approach to health encourages care of the whole person.

Ensuring The Functionality Of Wellness Initiatives In The Future

Improving and growing JEA's *Health Works* program is an important business objective. JEA realizes that one of the most efficient ways to impact the bottom line is to prevent illness and injury. In this way, expenses are positively affected by lower rates for Workers' Compensation, disability, and medical care claims, which result in increased employee productivity. It is both a business value and "the right thing to do" that motivates JEA to continue to fuse health and productivity management into the corporate culture. The following commitments ensure the viability of health promotion at JEA:

- 🕒 Continuation of the Safety & Health Services Department with dedicated staff, budget and strategic



plan for wellness. S&HS and *Health Works* initiatives and strategies are in alignment with JEA's mission, vision and values.

- ⌚ Funded support and annual training for our wellness team members (Wellness Work Force and SHAPE Representatives) to improve team members' knowledge and skill levels.
- ⌚ Continuation of incentive programs. The Annual Achievement Award is a company-wide incentive program that earns employees a monetary bonus by achieving annual company goals in the categories of safety, production, and customer satisfaction. The *Passport to Safety* program rewards individuals' and groups' performance in health and safety.
- ⌚ Formal company policies and procedures that create a supportive work environment for health promoting behaviors.
- ⌚ Tangible support from JEA's management and Board of Directors.
- ⌚ Outcomes of wellness initiatives to be linked to reducing health insurance rates.
- ⌚ Implementing targeted interventions based on results of HRA and claims data.

- ⌚ Professional development for Safety & Health Services staff members. Professional training is encouraged as well as, time for taking classes from JEA's extensive in-house training program of over 85 leadership, computer training and personal development courses.



Outcomes

The Impact Of Health Promotion Programs On Health Risks

- Heart disease is a silent killer. By the time a person has symptoms, lasting damage may have already occurred. JEA offers ultrasounds as a preventative screening, incurring minimal cost in detecting signs of heart disease early. Over the past five years of screenings, irregularities for 240 carotid arteries and 55 aortic aneurysms have been identified. These lifesaving interventions provide substantial risk reduction, and prevent future medical care costs for JEA's employees and retirees.
- JEA conducted a formal study to determine if implementation of a pre-packaged self-help program resulted in measurable behavior change in participants. The program utilized principles from the Surgeon Generals Report on Physical Activity and the Transtheoretical Stages of Change Model. The goal was to help employees incorporate an increase in physical activity while moving through the stages of change.

Data analysis using frequency and Wilcoxon tests showed a significant increase in participant activity levels, which were sustained over a six-month period. The progression through the stages of change was also statistically significant. The study was published by Eta Sigma Gamma in *The Health Education Monograph*, a National Professional Health Education Honorary. Since this type of program proved successful, JEA offers similar interventions to capitalize on this demonstrated behavior change method.

- Reduced health risks are further evidenced in answers from the HRA evaluation. These results are from 540 employees who responded to the 2005 survey and who participated in the 2004 HRA. The question asked: *"Have you made any of the following changes in your lifestyle due to participation in last years HRA?"*

Changes In Lifestyle	# Of Employees Reporting Change	% Of Employees Reporting Change
Better Overall Health or Health Awareness	364	67%
Made regular visits to Doctor	178	33%
Healthier Diet	166	31%
Increased Exercise	134	25%
Treatment for Diabetes, Cholesterol or HBP	127	22%
Weight Loss	126	23%
Stress Reduction	75	14%
Less Medication	39	7%
Quit Smoking	14	3%

Wellness Efforts And Financial Outcomes

1. Excerpts from: Health & Productivity Management ROI Report—FY '04

Expense:	Benefit - \$530,000
Salaries/Benefits - \$70,745	ROI—Benefit: \$530,000
Wellness Services/Charges - \$97,000	Expense: \$167,745
Total Expense - \$167,745	
\$3.17 ROI per each \$1 spent	

Supporting Information: During the previous two years, JEA's medical insurance premiums increased 4% and 6%. The industry average during this time had been 12%. Blue Cross identified strong health & wellness programs as one of the major reasons for lower premium rate increases. Assuming half the savings were wellness related this amounts to approximately \$530,000 in savings (benefit).

2. Excerpts from: SAFETY—ROI Report—FY '04

Expense:	Benefit - \$6.7M
Salaries/Benefits - \$759,292	ROI—Benefit: \$6.7M
Safety Supplies - \$208,500	Expense: \$2.4M
Other Services & Charges - \$664,800	
Safety Incentive Program - \$800,000	
Total Expense - \$2.4M	
\$2.79 of cost avoidance per \$1 spent	

Supporting Information: Benefit amount was derived from lower costs due to reduced numbers of injuries and workers compensation costs over the previous year. Injuries were reduced from 83 injuries in FY 2003 to only 47 in FY 2004. A strong safety component led the reduction efforts.



3. Disease Management Programs (members are from JEA's employees, retirees and dependant population on the Blue Cross health plan):

Case Management (148 members enrolled)

- » Program works with each individual to improve health status and reduce risks
- » Blue Cross reports a savings of \$32,736.32 from this program

Asthma Management (118 members enrolled)

Outcomes in one year:

- » 11% more asthmatic members used long-term control medications
- » Emergency room visits by asthmatics dropped from 19% to 11%
- » Inpatient admissions for asthma dropped from 8% to 7%

The reductions in inpatient and emergency room visits = an annual savings of **\$12,125**.

Diabetes Management (423 members enrolled)

Outcomes in one year:

- » Increased screening of HbA1C from 61% to 72% & for LDL-C from 55% to 73%
- » Percentage of those who had HbA1C of >9% were reduced from 18% to 14%
- » Percentage of those whose LDL-C was >130 mg/dL decreased from 28% to 26%
- » Emergency room visits for diabetes dropped from 2% to 1%
- » In patient admission for diabetes dropped from 9% to 8%

The reductions of inpatient and emergency room visits = an annual savings of **\$44,922**.

4. Flu Shots—An article in the New England Journal of Medicine provided a formula for showing the economic impact of vaccinating healthy working adults against influenza. Using JEA's population data in the same formula results in a **cost savings of \$278,715** for *Health Works* immunization program from 1998 through 2004.

5. Self-Care Guide Program—In 2003, JEA conducted a second self-care guide program using Self-Care Essentials from WELCOA. Presentations on how to use the guide including practice scenarios were made at 70 safety meetings with 2,245 guides distributed. Data shows the

average cost of a doctor visit is \$60 and an emergency room visit is \$383. For the first year after a self-care program, it is estimated that 5% of the households will avoid an unnecessary trip to the emergency room and 25% will avoid a doctor visit. Using our exposed population of 2,245 results in a savings of **\$76,667** and an **ROI of \$9.35 for each \$1 spent**.

6. Other ROI/Cost Avoidance Studies: A publication entitled *The Hidden Competitive Edge, Employee Health and Productivity* by the Employers Health Coalition, Tampa, FL., states to adequately gain a clear picture of bottom line costs an employer must look at work productivity (presenteeism) costs in addition to absenteeism costs. Comparing both of these gives a more accurate assessment of the overall costs of illness and identifies the interventions that can be targeted to provide the most return on investment. JEA's relevant studies in this area are:

Wellness Inventory Survey 2004—This survey administered by Pfizer assessed JEA's potential costs in absenteeism and presenteeism related to 11 health conditions and four conditions for care giving. The estimated potential for cost savings per employee sampled was \$3,895.

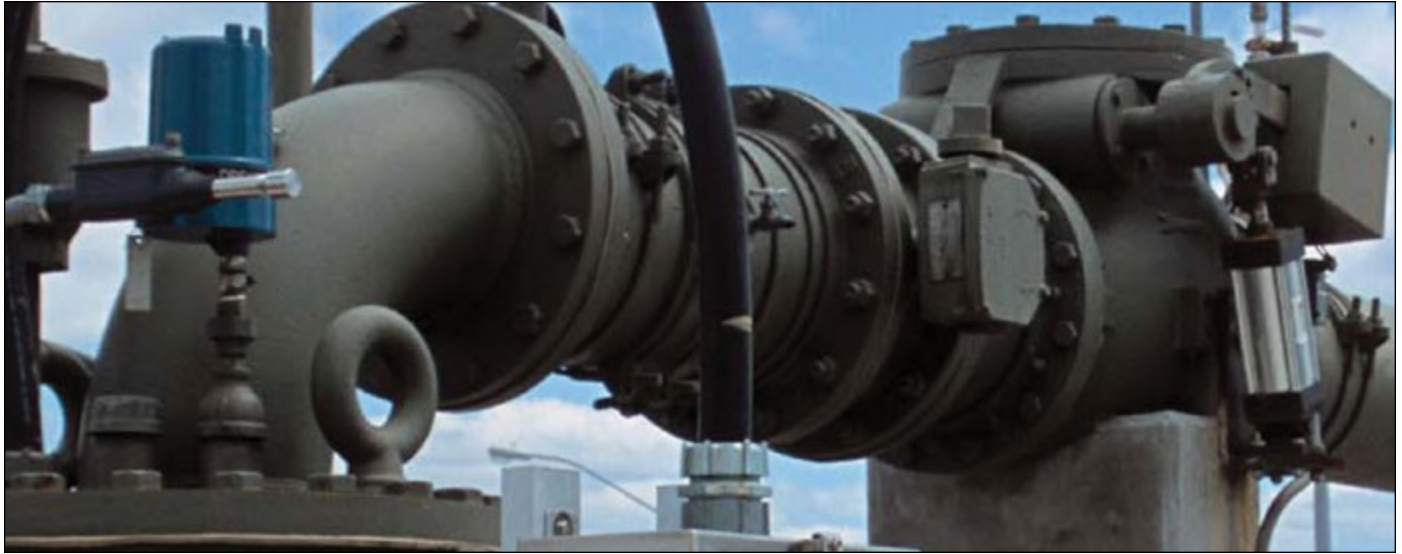
Blue Cross HRA Executive Summary Report 2004—provided similar data for potential cost savings based on health risks of the JEA population as measured by the HRA. Blue Cross indicates a potential cost saving of \$4,214,704 by using the recommended risk reduction methods. By using data related to the identified lifestyle changes reported in the 2005 HRA Survey (shown earlier in this section) into the Blue Cross formulas for potential cost savings, JEA realized a potential savings of up to \$1,548,144.

Pfizer Study—Pfizer conducted a study based on JEA's 2003 HRA results. The study was entitled: *Economic Analysis of the JEA Wellness Program: Is it cost effective to provide treatment for prevention of major coronary events?* The purpose of the project was to identify the prevalence of hyperlipidemia, hypertension, diabetes and smoking and apply cost avoidance measures as it relates to JEA's population.

Since interventions have been implemented to treat all four of these conditions, JEA has realized cost avoidance measures from a minimum of \$447,600 to a maximum of \$917,700.



Disease	NNT = Numbers Needed To Treat	JEA Pop. Prevalence N=759	Number Of Event Avoided	Fewer Number Of Lost Work Days	Cost Avoidance Per Year (\$)
Hyperlipidemia	63 – 217	37% or 285	1.3 - 4.5	39 - 135	\$29,000 to \$103,500
Diabetes	12.3 - 27.1	21% or 159	5.9 - 12.9	177-387	\$135,700 to \$296,700
Hypertension	15.6 - 31.1	21% or 150	4.8 - 9.6	144-288	\$110,400 to \$220,800
Smoking	10.9 - 18.9	18.6% or 141	7.5 - 12.9	225-387	\$172,500 to \$296,700



Advancing The Business Objectives

1. Alignment with JEA’s corporate strategic objectives:

Excerpt from *Operational Excellence: Workforce*. “JEA will maintain a best-practices workforce by investing time and dollars in succession planning, safety, health, and technical and business training, and by providing competitive market-based compensation and benefits.” The products, services, activities and data collection provided by Safety & Health Services in the areas of *Health and Productivity Management* and the other *12 Elements of Safety* directly support these business strategies. Safety and Health Services and the *Health Works* program is dedicated to improving employee health and safety to meet the needs of the organization by increasing productivity, preventing injuries and saving money.

2. Advancing JEA Brand Management efforts:

JEA has earned an outstanding reputation for being a leader in health and wellness through recognition received as a Well Workplace by WELCOA. This national exposure led to JEA being showcased in a variety of venues: articles in WELCOA’s *Absolute Advantage*, *Best Practices*, and *The Well Workplace*;

featured on Bill Frank’s *Forever Young* shown on the Health Channel; an article in *Health Magazine*; *Jacksonville Magazine*, and multiple articles in Jacksonville’s *Times Union* newspaper.

3. JEA has been recognized as one of Northeast Florida’s “Top 25 Family Friendly Companies” for seven consecutive years.

The competition judges local companies in the areas of supportive company policies, employee benefits, health and wellness initiatives, and community service projects. This recognition solidifies JEA’s reputation in the community as a premier employer.

4. Supporting JEA’s internal customer satisfaction goals:

At the end of each health and wellness event, participants are asked to fill out a customer satisfaction survey which is rated on a 10 point scale. All events have received an average score of 8.5 or higher for the past five years. Participant comments consistently praise JEA for providing wellness programs that invest in the health and well-being of employees, retirees and family members. Comments describe positive benefits participants receive from knowing their current health status and being provided guidance to improve their health.



Lessons Learned

Two Golden Rules

1 JOIN THE WELLNESS COUNCIL. Wellness Council materials provide everything needed to start and develop a professional wellness program. The local and National Wellness Council's are JEA's *Health Works* programs most valuable resource and joining them is the number one recommendation to be made to any company starting a wellness program.

2 COMMUNICATE EFFECTIVELY. The quality of communications can make or break a wellness program. Communications must be clear and concise and interest the individual in participating. To reach all parts of the population, messages must be provided using multiple formats and different mediums. A wider audience is reached by matching the content of the message to the five stages of change.

JEA's wellness program was developed on the principles of *The 7 C's* from WELCOA. By having management support and a cohesive wellness team from the beginning, many common pitfalls seen in some wellness programs were avoided. More of JEA's challenges were in how to grow and develop the program and to make events run efficiently and effectively. Having a well functioning program that minimizes participants time away from the job, earned *Health Works* a reputation as a company asset for employees and management.

General Tips For Success

- 🕒 **Use fitness centers for more than just working out.** Holding wellness events in the fitness center, will reinforce the need for overall fitness and new membership is encouraged.
- 🕒 **To be truly successful, the wellness program must have a formal staff,** a dedicated budget, and an organizational structure aligned with the company's mission.
- 🕒 **Identify the wellness program with a name and logo.** The same branding should be used on all wellness communications to provide program continuity. The approach must be creative yet meaningful to generate interest.
- 🕒 **Timing is everything.** Things to consider when planning an event are: time of day, day of the week, holiday and vacation periods, number of hours

needed, number of locations and size of the event versus size of the location. Make events convenient for the participants to reduce the time away from production.

- 🕒 **The only part the participant sees is the final product.** Preplanning individual events will prevent unnecessary mistakes and ensure success. Send reminder messages both the day before and the day of an event. Check all equipment to make sure it is working properly prior to the event.
- 🕒 **To save labor and help make an event flow properly,** make a paper template for room set up before moving any materials or equipment.
- 🕒 **Match activities to national or local events** such as racing themes, football season, holidays, and national health campaigns to add variety and interest for more participation.
- 🕒 **After the new year is a good time to set up behavioral change programs** as many people are more motivated to change.
- 🕒 **If you don't know, be sure to ask.** Assumptions can be costly in time and effort.
- 🕒 **Find the balance between what the employees want and the company needs.**

Lessons Learned And Recommendations

As an independent agency of the City of Jacksonville, JEA's wellness journey did not follow the "norm" of companies in a nongovernmental environment. Since JEA's money belongs to the rate-payers, discretion must be used in how the funds are spent. This may prohibit or limit type of incentives and events that can be offered. Extra creativity is required to make programs work that still meet city and state regulations.

Building trust and earning a reputation for protecting the individuals' privacy is essential. *Health Works* has been successful by working with excellent vendors who are professional and discreet. *Health Works* makes sure that HIPPA guidelines are followed, only aggregate results from screenings are collected, and individuals give permission for high risk follow up. High risk follow-up from screenings is provided by either the health plan provider or the contracted vendor.



Using a spokesperson from within a work location to introduce, advertise or talk about personal wellness experiences will provide added benefits to the wellness efforts. When a coworker gives personal testimony, the message means more and often increases participation. Also be sure to utilize the wellness team members. These team members know their co-workers best and have a vested interest in their health and well-being. Using information from the team member as to how best reach the locations population will provide the best chance for success.

There must be a balance between helping an individual and the amount of time away from the job. If the participant has multiple concerns, provide the most important information on-site and offer to follow up by sending additional resources. Follow-through with the individual is essential to maintain program integrity and meet the health needs of the individual. Do not over-commit.

Developing a detailed annual operating plan prior to the start each year is a key item in program success. When details are planned from the beginning, the program will have structure and be more effective.

Utilizing the results of needs assessments when building the operating plan will target the areas that are most important, give the program the correct focus and enable the best use of resources.

Program evaluation and measurement are the number one components that will ensure program viability. A program can not last that is considered “nice to have” rather than “must have.” As industry downsizes and budgets shrink, wellness programs are often considered expendable. A business case must be made using data to measure the benefits of a wellness program. It is not enough anymore to just “know” that keeping employees, safe, healthy and productive will save dollars. In making the business case, it must be stressed that improving health and increasing productivity are long-term but worthwhile ventures. The intangible effects of health and wellness are also benefits and must be presented along with the data to show a complete picture. The wellness and safety of the workforce is essential to the bottom line of the company.

Lastly, have fun and enjoy the challenge. It is a privilege to help improve the lives of others. If one approach doesn't work, learn from it and try something else. Don't give up—when an encounter with an individual seems less than successful, it may be just planting a seed that will be used later by the individual. The key to real success is to engage employees to take an active role in the process of developing and maintaining optimal health.



Vision For Health In The New Millennium

Protecting Employee Health And Well Being While Advancing Business Objectives

JEA's *Health Works* program will strive to make JEA a world class leader in employee health and wellness. *Health Works* will be the lead change agent to further refine JEA's corporate culture to one that increasingly promotes and fosters individual growth and development. The results will provide fewer health and safety risks, increased productivity and an improved quality of life for the employees, retirees and their family members.

The [Six Sigma] Black Belt team is comprised of an integrated group dedicated to finding cost savings for JEA's increasing health care expenditures.

The BHAGS That Drive JEA's Efforts

1 Using lessons learned from a Six Sigma Black Belt project, JEA will facilitate changes to health plan design that will limit the increase in health insurance premiums and maximize savings of health care dollars.

Steps To Reach This BHAG:

JEA has a Six Sigma Black Belt project in progress to:

- identify and understand the drivers of health insurance increases
- identify the health issues and health risks of most concern by population subgroups
- pin point the areas that will provide the most impact for positive change
- identify how to better focus and utilize our wellness resources for maximum advantage

The Black Belt team is comprised of an integrated group dedicated to finding cost savings for JEA's increasing health care expenditures. The team consists of members from Benefits, Safety & Health Services, Employee Services, Organizational Development, Blue Cross (health plan), and Marsh & McLennan (health insurance broker).

The expected results from the project include:

- detailed explanation of cost drivers of health insurance increases
- prioritized list of health issues subdivided by risk levels of JEA's population
- redesign of insurance benefit plans that incorporate wellness initiatives
 - metrics to monitor key frequencies to forecast future costs and trends



Keeping health insurance premium increases to a minimum will be considered a win-win for the company and the employees. This process will include re-designing the insurance plan options. As the new plan is developed, it will build in procedures that will increase participation in health promoting behaviors. The methods under consideration will offer incentives and health plan options that will affect the amount of money the employee or retiree has to contribute. JEA will also plan data collection and measurement methods that could be used for any opportunities future legislation may offer related to rebates and/or reductions for comprehensive wellness programs. Ideas for change include:

- changes to deductibles, co-pays and prescription drug coverage to make the best coverage options based on needs and usage
- making participation in HRAs a requirement
- offer rewards or incentives for reduction in health risks as measured during HRAs (such as: weight, BMI, BP, cholesterol, glucose) over specified periods of time
- reward the healthy population for being at optimal standards and maintaining them over specified periods of time
- offer incentives to individuals who quit smoking and remain a non-smoker

Building reward and incentive features for healthy behaviors into new health plan designs, ensures integration of wellness initiatives into the efforts to lower premium increases and save money. Success measurements will be the ability to limit premium rate increases and maximize savings of health care dollars.

2 JEA's *Health Works* will achieve higher skill levels in assisting JEA employees, retirees and their families to improve individual health conditions. This will be accomplished by refining targeted interventions to more subgroups of the JEA population. The goal is risk reduction for the individual which will result in increased productivity and improved quality of life.

Steps To Reach This BHAG Include:

1. *Health Works* is partnered with Blue Cross to improve the program offerings to retirees and their dependents utilizing lessons learned and feed back from previous events. The goal is to increase participation and provide tools to lower health risk levels specifically targeted to the needs of this population.
 - Move the health screening events out of corporate headquarters (located in downtown Jacksonville) and into areas of the community closer to the retirees homes.
 - Create a more appealing atmosphere by providing healthy food and time for socializing.
 - Separate retiree functions from employee events.
 - Provide educational interventions throughout the year on topics related to the high risk areas as identified by the screenings and health utilization data.
 - Provide self-care guides to increase retirees' knowledge and skills to know what to do for a variety of medical conditions.
2. *Health Works* is working with Blue Cross to add more on-line opportunities by providing additional health courses to the employees, retirees and dependents. The program is called Opening Doors to Health Education Questions and is provided by Eli Lilly.
3. Results of the 2005 Needs and Interest survey indicated that JEA needs to increase awareness of the health benefit plan options to optimize the use of health care dollars. JEA *Health Works* is collaborating with the Employee & Retiree Communications Department and Blue Cross to increase the number and kind of marketing methods to encourage employees, retirees and their families to use more of the benefits provided by our health plan.

These include:

- *Health Dialog* - health coaches and on-line health information
- *Blue Complements* - discounts on holistic and alternative care options
- *Solantic Urgent Care Centers* - medical facilities for non-emergency care during evening and weekends hours used to reduce improper use of emergency room visits
- Mail order prescription program to save participants time and money
- Use of generic drugs when the option is medically acceptable



“JEA is the largest community-owned utility in Florida and the eighth largest in the United States. We are committed to our purpose—to improve the quality of life in the communities we serve, with a spirit that has united our business for 109 years.”



Additionally, more communications will be provided to health plan members to better explain the reasons for rising health care costs and insurance premiums. Included will be a proactive approach the individual can take to lower health care expenditures. Education is the tool JEA will use to assist health plan members to be wiser consumers of health care.

4. The aggregate HRA data has recently been subdivided by large work locations. While still maintaining privacy, this stratification allows *Health Works* the opportunity to identify prevalence and health risks in smaller segments of the population. *Health Works* will combine the aggregate HRA results with the data gathered from the Six Sigma Black Belt project to provide interventions specifically targeted to the needs of each population. Success measurements will be determined by comparing medical utilization rates of HRA participants versus non-participants and by comparing future intervention outcomes to benchmarked data.

3 JEA will develop and implement a plan to move *Health Works* into a health promotion program that fully utilizes the concepts of Health and Productivity Management. Background: Sharon Clark, a Safety & Health Services team member, will be proposing a practicum project to Nova Southeastern University for her Doctorate to accomplish this goal.

Steps To Reach This BHAG:

- Form a process improvement team integrating members from various JEA departments.
- Complete a needs assessment that will define the goals and objectives of the project.
- Complete a literature review to learn health and productivity and health population, management principles and concepts from referenced sources. Sources will include *WELCOA Infopoint*, *Absolute Advantage*, best practice models, books, and journals.
- Develop a road map with an action plan to adapt the learned principles and concepts to align with JEA's culture and operating methods. The plan will identify required resources, timeline, measurement tools and evaluation methods.
- Present project proposal and an implementation plan to JEA management.

Success measurement is completion and implementation of the project within the next two to three years. This project will enable JEA to fully utilize their outstanding human capital resources as a competitive advantage in the business marketplace. This project is a sound business decision that can help realize a solid return on investment for JEA's internal and external stakeholders.

JEA's *Health Works* initiatives have facilitated significant changes in the health status of JEA's population over the years. *Health Works* is a very valuable resource within JEA that will continue to prosper as the outlined improvements are made. JEA is proud to already be among "One of America's Healthiest Companies." JEA would be greatly honored to continue that legacy by being recognized as a Wellness Councils of America's *Platinum Level Well Workplace*. JEA appreciates your consideration and looks forward to your review and feedback of this application package in pursuit of that goal. ★



This case study was originally submitted in July 2005 and released in September 2006 on WELCOA's website at www.welcoa.org. If you have questions or comments concerning this case study, please contact Sharon Clark of JEA. Sharon is responsible for development, administration, and management of "Health Works," JEA's Health Promotion Program. She has a proven record of success in developing and implementing health promotion initiatives. In 2005, JEA earned designation as a Platinum Well Workplace from the Wellness Councils of America. Sharon can be reached at clarsa@jea.com.



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The Well Workplace Awards initiative recognizes and rewards exemplary workplace wellness programs. To learn more, log on to www.welcoa.org/wellworkplace.

FORM & FUNCTION

**Important Considerations For Team Size,
Team Strengths, and Decision Making**

| By David Hunnicutt, PhD



If you want to get the best information on wellness teams, you have to consult with the experts. For this article, we asked three of the nation's most respected wellness minds about the appropriate form and function of wellness teams.

What they told us was most surprising.

Size

The first person we spoke with concerning wellness teams was Dr. Steve Aldana. Dr. Aldana is a professor at Brigham Young University and author of *The Culprit and The Cure*. In our conversation we asked Steve this question, "If you could give wellness practitioners one piece of advice about wellness teams, what would it be?"

Without hesitation, Steve replied, "Make sure that your team is large enough to be representative of your entire organization."

Steve went on to elaborate, "Too many times, corporate wellness teams become an elite inner circle run by the ultra-healthy. I think this is harmful to the overall wellness program. From my perspective, it behooves wellness practitioners to make sure that the team is big enough to include diverse opinions. What's more, I encourage wellness teams to make sure to include people that aren't big fans of health promotion in the first place."

Strengths

The second person we spoke with was Bill Baun. Bill is the wellness guru at MD Anderson in Houston, TX. Over the last 25 years, Bill Baun has been one of the greatest advocates and practitioners for worksite wellness in the country. To be consistent, we posed the same question to Bill.

What was really interesting about our conversation with him was the amount of emphasis that Bill placed on making sure that the team understood its individual strengths and that those individual strengths were leveraged to create a team identity.

According to Bill, "It doesn't matter where you go or what industry you are in, each effective wellness team has a unique identity and style for getting things done. This comes from understanding individual strengths. For example, some teams get things done through energy and enthusiasm because the team is composed of energetic and enthusiastic people. Other teams may get things done through brainpower. That's because they're largely made up of people who are intellectual and inquisitive by nature. Other teams rely on creativity. I think you get the idea."

"Now don't get me wrong here. I'm not saying that the team should only have one type of personality. In fact, there should be many different personalities. But to be effective, those personalities have to translate into a team identity."

Baun concluded, "If you want to have a successful wellness team, you've got to blend individual strengths to create a team identity. If you do this, you're definitely headed in the right direction."

Decision Making

The third person we spoke with was Aaron Hardy. Aaron is the mastermind behind the award-winning program at Washoe County School District. In this capacity, Aaron has created a brilliant health promotion initiative that has demonstrated bottom-line outcomes.

Aaron Hardy believes that well-functioning teams have an inner circle of "decision makers" that can make the final call in order to move the team forward.

"In my experience, it's important to have a representative team, but it's equally important to have some decision-making process for solving and resolving issues—which I guarantee will come up. If you don't have this mechanism in place, you get into a majority rules mentality and then it's a free-for-all."

Hardy continues, "Some may disagree with this, but I believe that the inner circle of the wellness team that has the decision-making authority should be well-represented by health promotion professionals. After all, these folks have been formally trained in the applied health sciences—they've got the filter and the expertise to make excellent and well-grounded decisions."

How's Your Form And Function?

It was fascinating to hear three top minds in workplace wellness speak out on teams. Now the question becomes, "How's your team's form and function?" We hope that you'll take these three seemingly different ideas and embrace the creative tension to measure your team against each of our expert's opinions. ★



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The Well Workplace Checklist

Wellness Teams

To assess your wellness team's cohesiveness, we encourage you to answer the following eight questions. If you're interested in getting a score and a response to these questions, be sure to log on to InfoPoint—WELCOA's members only website—and take the Well Workplace Checklist in its entirety. In so doing, you will receive a set of scores for each of the seven benchmarks as well as a customized, in-depth report on your company's overall wellness efforts.

↙ Our wellness team has been in place:

- Less than one year
- 1-2 years
- 3-5 years
- 6 or more years

← Our wellness team consists of:

- 2-4 members
- 5-8 members
- 9-12 members
- 13 or more members

↑ Our wellness team is comprised of members from the following areas.

Human Resources | Benefits Administration
Occupational Health | Finance | Marketing
Communications | Safety | Information Systems
Healthcare Provider | Insurance Provider
Employee Assistance Program

- At least 2 of these key areas
- 3 of these key areas
- 4 of these key areas
- 5 or more of these key areas
- Less than 2 of these key areas

→ Our wellness team members are appointed for:

- A one year term
- A two year term
- A three year term
- Ongoing terms, our wellness team terms are written into individual's job descriptions
- Our wellness team does not require a formal time commitment from our members



Our wellness team:

- Operates without the direction of a team leader
- Functions under the leadership of someone who has not been formally trained in health and wellness
- Operates under the leadership of someone who has been formally trained in health and wellness
- Functions under a senior executive level leader that has been formally appointed to this position
- Has not yet considered the leadership issue



Choose the statement below that best describes your wellness team's efforts.

- Our team is responsible for planning and delivering various awareness-raising wellness activities throughout our organization.
- Our team is responsible for collecting data, crafting a plan, delivering both high-risk and low-risk programs.
- Our team is responsible for collecting data, crafting a plan, delivering both high-risk and low-risk programs, and creating a supportive environment.
- Our team is responsible for collecting data, crafting a plan, delivering both high-risk and low-risk programs, creating a supportive environment, and monitoring and evaluating outcomes.



Our wellness team meets:

- Semi Annually
- Quarterly
- Six times per year
- Monthly



Choose the statement below that best describes your wellness team's method of operating.

- Our wellness team has a pre-established agenda.
- Our wellness team has a pre-established agenda and takes notes at each meeting.
- Our wellness team has a pre-established agenda, takes notes at each meeting, and distributes minutes to each team member.
- Our wellness team has a pre-established agenda, takes notes at each meeting, and distributes minutes to each team member and senior level executive.



For more information, log on to WELCOA's InfoPoint website:



The Well Workplace Checklist—a copyrighted and trademarked tool of WELCOA—is an interactive assessment that will help you determine how your organization is doing with respect to worksite wellness. To complete the online assessment, you'll

need to log on to *InfoPoint*—WELCOA's members only website. Once there, the Checklist should take you about 20 minutes to finalize. Once you are finished, you will be able to download a short report outlining your overall scores. Shortly thereafter, a full report will be emailed directly to you.





WELCOA's Seven Benchmarks of Success

For the past 20 years, the Wellness Councils of America has dedicated its efforts to studying and promoting the efforts of America's Healthiest Companies. During that period, WELCOA developed its patented Well Workplace process. At the core of the Well Workplace model, we have identified seven key benchmarks of success.

Specifically, these seven benchmarks are inherent in companies that have built results-oriented workplace wellness programs.

Benchmark #1: Capturing CEO Support

From our experience, CEO support is essential to the process of developing best-in-class programs. Indeed, we know of very few programs that have contained costs and improved employee health that don't have strong senior level support.

Benchmark #2: Creating Cohesive Wellness Teams

Once CEO support has been captured, the next task is to create a cohesive wellness team. Teams are essential to building great wellness programs because they help to distribute the responsibility for wellness throughout the organization.

Benchmark #3: Collecting Data To Drive Health Efforts

The team's first and primary responsibility is not to start offering programs, but rather to step back and gather important data. The data will be collected using corporate culture audits, health risk appraisals, and knowledge and interest surveys. This data is extremely important because it will reveal the specific areas of health needs and interests within the organization.

Benchmark #4: Carefully Crafting An Operating Plan

With essential forms of data having been collected, the task is now to develop an operating plan for health and wellness within the organization. This operating plan will serve as the roadmap and will guide the company's efforts and investments in workplace wellness.

Benchmark #5: Choosing Appropriate Interventions

With the first four benchmarks completed, it is now appropriate to begin choosing and implementing the appropriate health and productivity interventions. These interventions will most likely include tobacco cessation, physical activity, weight management, self-care, and stress management. But, they also may include things like fatigue management and ergonomics—depending on what the company's data reveals.

Benchmark #6: Creating A Supportive Environment

Once the appropriate health promoting interventions are up and running, it's time to create a supportive environment. Indeed, by having a supportive environment, organizations can be confident that employees will be supported in their efforts to lead healthier lives. Environmental interventions may take the form of policies, physical modifications, and rewards and incentives.

Benchmark #7: Carefully Evaluating Outcomes

The seventh and final benchmark in the Well Workplace model is carefully evaluating outcomes. It is within this benchmark that companies will religiously keep score when it comes to their wellness program. Evaluation targets include things like participation, participant satisfaction, behavior modification, and cost containment.

Wellstream

Health Risk Assessment

WELCOA's Online Health Risk Assessment

The Wellness Councils of America, one of the nation's premier resources for workplace health promotion, is proud to introduce *Wellstream*. *Wellstream* is an innovative, user-friendly health risk assessment. This powerful online tool will help your employees to assess and monitor their personal health status. More importantly, *Wellstream*—through its aggregate reporting function—will allow you as an employer to decipher important organizational health trends and introduce the appropriate health management interventions.

Wellstream Is More Than Just An HRA

With more than two decades in the business of worksite wellness, WELCOA can help you set up an aggressive and effective communication campaign and incentives to drive up participation. So when you purchase *Wellstream*, you'll get much more than just an online assessment...you'll get a partner who is committed to helping you succeed.

Wellstream Can Be Customized

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Creating Cohesive Wellness Teams

Developing Results-Oriented Wellness Programs One Company At A Time



This issue of *Absolute Advantage* is all about wellness teams.

The second of the seven critical benchmarks of success, Creating A Cohesive Wellness Team, is a vital step in developing a results-oriented worksite wellness program. With this in mind, we've devoted the entire issue to this benchmark.

To get you started, we've identified the 10 secrets of successful wellness teams. In this article, you'll find great information from some of the nation's best practitioners.

Next, we've set forth a series of important recommendations that, if followed, can help your wellness team catch fire. We're betting that these suggestions will make perfect sense and ignite a new passion in your team.

Having set forth a general framework and ideas on how you can implement it, we then identify one of the best tools for helping your wellness team to build its collective muscle. Developed by the Gallup Organization, the tool is StrengthsFinder™, and I think you'll find this article fascinating.

Heading down the home stretch, we've included an expert interview from Dr. Lee Handke, Vice President of Wellness from Blue Cross Blue Shield of Nebraska. In this interview, Dr. Handke shares a number of important insights about wellness teams and how to effectively use them to create a healthier organization.

Following this interview we've included the amazing case study of JEA. This Jacksonville-based company has done some pretty remarkable things in the area of wellness—and a great team has helped to drive the process.

We hope that you enjoy this issue of *Absolute Advantage*, and find it useful in your quest to fully implement the seven benchmarks of success in your organization.

Yours in good health,

Dr. David Hunnicutt
President

The 10 Secrets of Successful Worksite Wellness Teams

When it comes to building results-oriented wellness programs, teams are a big part of the equation.

In this article, we'll share the 10 secrets of successful worksite wellness teams.

WELLNESS TEAM
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14 Catch Fire: Great Ideas For Infusing Energy And Commitment In Your Wellness Team

It comes as no surprise that teams with great energy produce great results. You can make sure your wellness team is energetic by implementing the following suggestions.



18 Building Team Muscle: Assessing Individual Strengths To Develop A More Effective Wellness Team

It's been said that there is no "I" in team. We disagree. In this article, we'll present a great tool for assessing individual strengths to help your team become stronger and more effective.



22 It's All About Teams

When it comes to wellness at Blue Cross Blue Shield of Nebraska, it really is all about teams. In this expert interview, Dr. Lee Handke, Vice President of Wellness shares fascinating insights about the wellness team at BCBSNE.



32 Case Study: JEA

JEA is a remarkable case study of how an organization started with a novel idea and developed a team to get the process started. Over the years, JEA has continued to refine its approach to wellness. Today they are one of America's healthiest companies.



52 Form and Function

In this article, three top wellness minds reveal important insights regarding team size, team strengths, and decision making.