

**OSC 12**  
Ohio Safety Congress & Expo

**WELL AT HOME. SAFE AT WORK.**

**926 Essential Elements of Successful Wellness Programs**

Patrick Trotter, MPH, FACHE

Tuesday, March 27, 9 a.m. to 4 p.m.

 Bureau of Workers' Compensation



**ESSENTIAL ELEMENTS OF SUCCESSFUL WELLNESS PROGRAMS**

*Trotter*  
**Wellness**

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**GENERAL OVERVIEW**

- What should we look for?
  - Customized Wellness Program Management solutions
  - Lifestyle health risk awareness tools
  - Easy to understand health education information
  - Comprehensive Health Coaching programs
  - Comprehensive HIPAA sensitive results reports
  - Financial Return on Investment for each dollar spent

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**A PROGRAM SHOULD PROVIDE:**

- The **foundation** for increased consumer engagement and long term cultural change.
- Provide **programs** that align assessments, personalized coaching, education, web tools, and targeted information.
- Give **employees** new opportunities in their health and wellness decisions.
- Better help **employers** have more predictable health related costs.

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**GENERAL SCREENING QUESTIONS**

- How many elements does the vendor own, rent or partner with?
- How long have they been in business?
- How many clients do they have?

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**GENERAL SCREENING QUESTIONS**

- How many people access their HRA per year?
- What is their geographic coverage?
- What is their client retention rate after one year?
- What is their documented ROI?

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### MODEL SHOULD BE BASED ON:

- Population Health Risk Management
- Current scientific process
- Published peer review studies and business cases
- Proprietary platforms and systems
- Ease of use and cost effectiveness
- Results driven program management

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### POPULATION HEALTH RISK MANAGEMENT APPROACH

POPULATION	HEALTH CARE RESOURCES (\$)
80% Well (40% Alleged Well)	18%
14% Episodic	25%
5% Chronic	33%
1% Catastrophic	24%

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### KEY PROGRAM FOCUS AREAS

- High participation
- High satisfaction
- Logistics
- Communications
- Incentive planning
- Health Coaching
- Outcome measurement

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### RESULTS-DO THE NUMBERS MOVE?

- 80% + program participation for employees and spouses.
- 90%+ satisfaction with Health Coaching (third party company survey results).
- 90%+ retention rate of clients after the first year.
- Documented Health related costs reductions.
- What is the average ROI for those who measure.

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### CLIENT DIVERSITY CRITICAL (SAMPLES)

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### ESSENTIAL PROGRAM ELEMENTS

- Program Design & Logistics
- Communication Plans
- Incentive Planning
- Biometrics
- Advanced Health Risk Assessments
- Health Coaching
- Education/Web Tools
- Ongoing Measurements
- Reporting
- Action Plans

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## PROGRAM DESIGN & LOGISTICS

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## PROGRAM DESIGN & LOGISTICS

- Comprehensive consulting to identify organizational program goals, develop proper messaging for communications and provide a seamless implementation process.
  - Identifies internal communication networks
  - Interviews key executives
  - Environmental Assessment Completed
  - Telecoaching Resource File Produced
  - Implementation planning and coordination
  - Timeline of key events

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## MATERIALS AND SUPPORT

**Environmental Assessment**

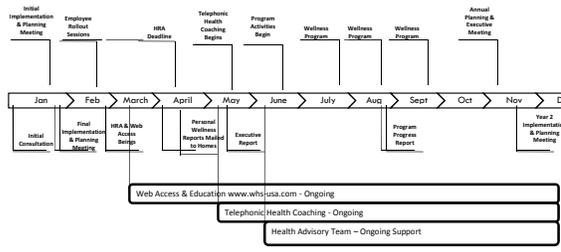


**Coaching Resource File**



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## SAMPLE TIMELINE CALENDAR



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## ACCOUNT MANAGEMENT

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## ACCOUNT MANAGEMENT



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graph TD
    DWSM[Director of Wellness Services Management] --> WAM[Wellness Account Managers (WAM)]
    DWSM --> WPC[Wellness Program Coordinators (WPC)]
    DWSM --> WPS[Wellness Program Specialists (WPS)]
    DWSM --> OHC[Optimal Health Coaches™ (OHC)]
    
```

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## COMMUNICATION PLANS

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## COMMUNICATION PLANS

- Strategy to engage participants
- Messaging and staging
- Timelines and key dates
- Marketing the “Why”

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## SAMPLE COMMUNICATIONS

**What do you want for your health?**

- Learn what your personal health risks are
- Become aware of the health risks and practices that determine personal well-being
- Receive tools to improve your health and enhance your life

**Complete your Health Solutions® Health Risk Assessment Today!**

**Replace finding an excuse with finding a way...**

**Connect with your Health Coach Today!**

Sign up now, and receive a personal health coach for \$12.99 (one-time fee only)

Schedule by Phone: 1-888-381-2942

Available Online: [www.trotterwellness.com](#)

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## INTERVENTION GUIDES

- Included in each member's membership package is a targeted intervention guide.
- Guides provide members with accurate information and recommendations for health enhancement.
- Each guide includes practical information on risk reduction and health improvement through informative, easy-to-follow steps that involve the member in making responsible, healthy, personal choices.
- Guides reflect the most current research in disease prevention, self care, and health promotion.



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## INCENTIVE PLANNING

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## WELL THOUGHT OUT INCENTIVE PLANNING

- Critical to participation
- Communicates the organizations beliefs about wellness
- Communications must be carefully planned
- Must fit the culture of the organization

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### WELL THOUGHT OUT INCENTIVE PLANNING

- Many types of rewards can be used
  - Participation in key components
  - Reward for activities/behaviors
  - Results based Incentives
- Incentives will significantly increase participation
- Incentives can produce significant economic savings
- Connected to many other aspects of the workplace in a complementary way

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### BIOMETRICS

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### BIOMETRICS

- Conduct a Blood Pressure screening and basic lipid profile which includes:
  - Total Cholesterol
  - LDL (Low Density Lipoproteins)
  - HDL (High Density Lipoproteins)
  - Triglycerides
  - Glucose
- Tests performed onsite and at draw sites
- Results are mailed to the home
- Results are uploaded into the HRA
- Scheduling is online



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### HEALTH RISK ASSESSMENT

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### HEALTH RISK ASSESSMENT

- The HRA should be designed to improve quality of life by evaluating the present status of participants' lifestyle behaviors and make suggestions for their future.
- Topics that should be addressed:
  - Weight
  - Fitness
  - Nutrition
  - Cancer
  - Coronary Risk
  - Substance Use
  - Safety
  - Stress



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### HEALTH RISK ASSESSMENT

- Several modalities should be available to increase participation
  - Online
  - Paper
  - Oral Interviews
  - Translation Assistance
- Different languages should also be available

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## HEALTH RISK ASSESSMENT REPORT

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## HEALTH RISK ASSESSMENT REPORT

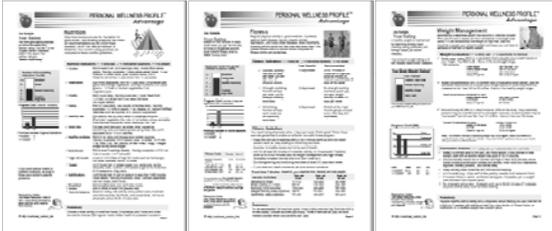
- Topics That should be Covered:
  - Wellness Overview
  - Priority Health Recommendations
  - Coronary Risk
  - Cancer Risk
  - Diabetes Risk
  - Osteoporosis Risk
  - Nutrition
  - Stress & Coping
  - Safety
  - Weight Management
  - Medical Follow-up
  - Next Steps – Making Changes



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## HEALTH RISK ASSESSMENT REPORT

- The Personal Wellness Profile™ report received by participants who complete the HRA is well presented, easy to read, and attractive.



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## HEALTH RISK ASSESSMENT REPORT

- The Health Risk Assessment Report Should Help participants by...
  - Identifying health risks they may have
  - Offering suggestions for ways to improve their lifestyle
  - Pointing out the benefits of good health habits
  - Letting them know where they are doing well
  - Telling them if they have made improvements over time
  - Giving them the information they need to take charge of their health
  - Assessing risk behaviors, chronic conditions, diseases, symptoms and medication along with all major health conditions
  - Emphasizing modifiable health risks
  - Providing personalized stage of readiness and change assessment for each health risk

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## HEALTH RISK ASSESSMENT REPORT

- Online report viewing should include interactive links
- Interactive topics may include:
 

- Healthy Weight	- Mental Outlook
- Physical Activity	- Sleep
- Fruits & Vegetables	- Coping Skills
- Whole Grains	- Alcohol
- Saturated Fats	- Sick Days
- Cholesterol	- Health Perception
- Smoking	- Safety
- Blood Pressure	- Preventive Exams
- Glucose/Diabetes	- Osteoporosis

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## OPTIMAL HEALTH COACHING™

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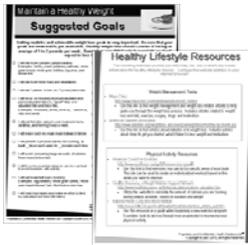
### ABOUT HEALTH COACHING

- The **catalyst** for long term sustainable behavior change. Awareness is only the first step and it is not enough.
- **Outcomes must be** measurable and quantifiable
- It should **coordinate** and **optimize** other available services and resources for the company and the members through the use of a Coaching Resource File
- The **Health Coaching model must be** private, confidential, personalized, and convenient.

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### HEALTH COACHING

- Enroll 100% of participants who complete the Health Risk Assessment
- Review Health Risk Assessment Report
- Discuss of top risk factors
- Assess risk awareness
- Facilitate and support health goal achievement
- Provide health education
- Encourage and guide



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### HEALTH COACHING-HOW IT WORKS

- Each member should be able to select their Health Coach
- Convenient and easy access to schedule appointment **online or by phone a must**
- High levels of engagement and satisfaction are due to effective communications, scheduling systems and positive behavior change.
- The approach must individualized through the use of a tailored and targeted **Individual Health Plan** developed and agreed upon between the Health Coach and the member.

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### HEALTH COACHING-HOW IT WORKS

- Health Coaches should:
  - Identify and explain health risks through biometrics, HRA and Health Coaching results
  - Develop individual Optimal Health Action Plan™
  - Assist in setting specific goals and actions

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### HEALTH COACHING-HOW IT WORKS

- Health Coaches should:
  - Support positive behavior change
  - Focus on current strengths
  - Follow up throughout the year
  - Guide member to available resources
  - Monitor progress
  - Provide feedback on performance

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### HEALTH COACHING-TRACKING AND REPORTING

- Health Coaches should be able to referrals and recommendations to optimize employer resources through use of the Coaching Resource File
- All interactions, risks identified, goals set, referrals made and behaviors changed should be confidentiality tracked and documented.
- Aggregate Health Coaching reports should include:
  - On-going program activities
  - Blinded participant feedback & testimonials
  - Recommendations to enhance engagement

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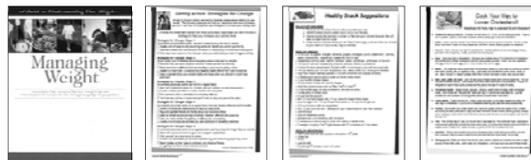
### CALIBER OF HEALTH COACHES

- They should be Health professionals all trained in one proprietary model with a minimum of a Bachelors Degree in health, wellness or related field.
- Comprised of:
  - Health Promotion and Wellness experts
  - Certified Health Education Specialists (CHES)
  - Physical Trainers
  - Registered Nurses
  - All Optimal Health Coaches™ (certified by the American College of Health Coaches®)

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### EDUCATION RESOURCES

- Members should have access to hundreds of educational resources through their Health Coach.
- Resources must be designed to assist each member in making and sustaining healthy lifelong behavior change.



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### HEALTH COACHING REPORTS

- **Health Coaching Reports Should track:**
  - Health Coaching Enrollment and Activity
  - Health Topics & Behavior Change
  - Health Education Materials & Resources
  - Member Insights and Trends

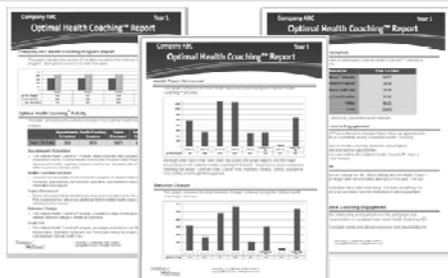
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### HEALTH COACHING REPORTS

- **Report presentations should also:**
  - Share the progress of the program activities including calls, sessions, goals set, engagement levels, educational materials sent, etc.
  - Referrals made to specific resources
  - Share insight and discuss trends
  - Share comparative data from previous year(s)
  - Share recommendations for increasing engagement

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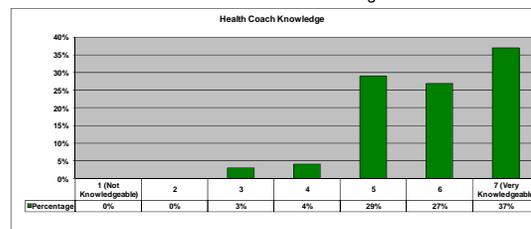
### HEALTH COACHING REPORT EXAMPLE



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### INDEPENDENT SURVEY RESULTS SHOULD BE AVAILABLE

- Knowledge Level of Health Coach
  - 93% felt their Health Coach was knowledgeable



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### INDEPENDENT SURVEY RESULTS

- Overall Health Coaching Experience
  - 92% felt positive in relation to their overall Health Coaching experience.

Rating	Percentage
1 (Not at all Positive)	1%
2	1%
3	2%
4	4%
5	31%
6	21%
7 (Very Positive)	40%

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### WEB TOOLS & RESOURCES

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### WEB TOOLS AND RESOURCES

- Member Portal (Using Ours As an Example)
  - Health Risk Assessment
  - Health Coaching Scheduler
  - Healthy Living Guidelines™ Streaming Videos
  - Online Interventions
  - Online Wellness Center™
  - Online WellNotes®
    - Health Challenges™

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### MEMBER PORTAL

Members can access:

- Health Coaching Scheduler
- Healthy Living Guidelines™ Streaming Videos
- Online Interventions
- Online Wellness Center™
- Online WellNotes®
- Personal Wellness Profile™ (PWP)

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### HEALTHY LIVING GUIDELINES - VIDEOS

Features of the Healthy Living Guidelines™ Streaming Videos

- Reviews Personal Wellness Profile™ report sections.
- Guides members on where to find critical information within their report.
- Educates members on prevailing health risks.
- Discusses biometric scores to help members understand their risks.
- Presents scientifically sound data supporting healthy behavior modifications.
- Recommends way to minimize member health risks and ultimately achieve optimal health.

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### WELLNOTES® ONLINE NEWSLETTER

- A monthly newsletter that features current health issues and recommendations for living a healthy lifestyle.

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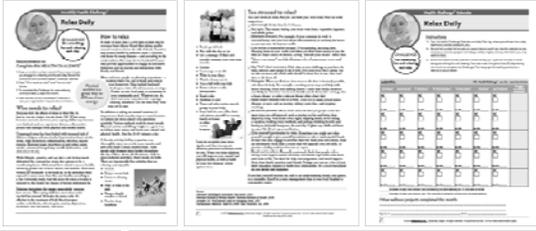
## WELLNOTES® ONLINE NEWSLETTER

- WellNotes® Features:
  - Brief and practical health improvement articles
  - Information about cutting-edge health and medical breakthroughs
  - Monthly Health Challenges™, complete with step-by-step plans to help you incorporate good health habits into your life
  - Links to health information and reliable health sources
  - An "Ask the Doctor" column
  - Information acquired from leading and respected public and private health organizations

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## ONLINE HEALTH CHALLENGES™

- Included with WellNotes® are monthly Health Challenges™ which provide an opportunity to learn and practice on or more good health habits for 30 days.



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## ONLINE WELLNESS CENTER™

- Comprehensive health improvement and wellness education Web site that will teach participants how to:
  - Improve their health
  - Prevent disease
  - Manage chronic health problems
  - Access reliable instructions for improving their quality of life
  - Keep up with the latest health and wellness information



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## ONLINE INTERVENTIONS LIFESTYLE CHANGE MODULES

- These programs are evidence-based cognitive behavioral trainings that help people change the way they think about themselves, their life, and their lifestyle.
- The programs teach simple, personal, motivating principles that are practical and enlightening.
- Thousands of people worldwide have successfully improved the quality of their life.
- They are fully integrated into the Health Coaching Model and tracked accordingly



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## ONLINE INTERVENTIONS HOW DO THEY WORK?

- Participants watch as little as one video per week at their leisure. They may view them more often if they choose.
- Between sessions, they apply one power principle learned in the video that is designed to remove barriers, create possibility, and keep them focused on their vision.

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## ONLINE INTERVENTIONS LIFESTYLE CHANGE MODULES

- Participants also have access to a wealth of educational resources that coincide with the module.



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## ONLINE INTERVENTIONS LIVING LEAN™ FOR WEIGHT MANAGEMENT



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## ONLINE INTERVENTIONS LIVING LEAN™ FOR WEIGHT MANAGEMENT

- Eight week program consisting of 12 sessions along with active Health Coaching
- After six month, the average amount of weight lost is 26.6 pounds.
- Testimonial:
  - "Before Living Lean, I was not a healthy person. I was 55 pounds over weight. I had a triple bypass at the age of 46. Since Living Lean, I've lost 33 pounds and know I will lose the additional 20 left to go. I'd like to thank you for helping me see a simpler way to lose weight. I would also like to thank you for your support and helping me to live a happier life than I have in years." - Dennis Bender, New York

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## REPORTING

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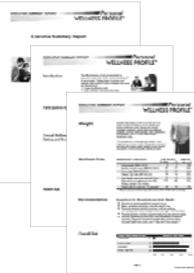
## EXECUTIVE REPORTING

- Aggregate reporting should summarize:
  - Lifestyle Health Risks of the population
  - Health Risk Behavior Opportunities
  - Medical & self-care patterns
  - Health Coaching progress
- Quantifies readiness to change
- Provides a year to year comparison
- Provides an basis for an Action Plan for next steps
- Establishes program benchmark
- Measures results

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## EXECUTIVE SUMMARY REPORT

- The Executive Summary Report is a 20 page report packed with valuable information.
- This report summarizes the primary health findings for those members who have completed the Health Risk Assessment.
- Group health needs and risks are presented along with recommendations for initiating risk reduction and health enhancement programs.



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## EXECUTIVE AGGREGATE REPORT

- Provides a comprehensive company aggregate report which includes analysis, recommendations, and financial targets.
- The aggregate report summarizes the lifestyle health risks, health behaviors, medical and self-care patterns, and quantifies your population's readiness for changing behaviors which contribute to poor health and chronic disease.

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## EXECUTIVE AGGREGATE REPORT

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## FINANCIAL & PRODUCTIVITY REPORTS

- The productivity and economic benefits report should summarize the prevalence of health risks in your organization linked to increased costs and shows potential savings that may be realized by improving the health status of your employees.

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## ACTION PLANS

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## ACTION PLANS

- Thoroughly reviews high claims, biometric results, and aggregation of Health Risk Assessment reports
- Your organization should be provided with a complete action plan
- This plan will outline, in detail, actionable items for implementation throughout the year which address the identified high problem areas and describe methods to maximize participation

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## ACTION PLANS

- Action plans encompass the following areas:
  - Educational opportunities
  - Company activities
  - Incentive programming
  - Additional programs
  - Referrals to other resource
  - Communications on program progress
  - Updates to members and management

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## ACTION PLANS

- Detailed implementation recommendations for each month:
  - Logistics planning
  - Interventions
  - Observances
  - Education
  - Resources

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## ACTION PLANS

- **Educational Sessions (specific to Weight Management)**
  - Healthy Weight
  - Emotional Eating Presentation
  - Rev Up Your Metabolism
  - Portion Distortion
  - Stuck in the Middle
  - The Skinny on Dieting
  - Identifying and Overcoming Influences on Our Health
  - Active for Life

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## ACTION PLANS

- **Challenges & Program (specific to Weight Management)**
  - Trim to Win Challenge
  - Charity Weight Loss
  - Healthy Habits Challenge
  - Food Pyramid Challenge
  - Lifelong Weight Management
  - Fitness for Life
  - Step Into a Health Weight
  - Maintain, Don't Gain

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## MEASUREMENT

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## WHAT'S THE ROI?

Study Parameters	Outcomes (56 Studies)
Average Study Years	3.66
Number of study subjects	483,232
Cost /Benefit Ratio <small>(22 of the 56 studies report on Cost Benefit Ratio)</small>	5.81
% Change in sick leave <small>(23 of the 56 Studies Report on change in sick leave)</small>	-26.8%
% Change in health care costs <small>(28 of the 56 studies report on change in health care costs)</small>	-26.1%
% Change in disability/work comp <small>(7 of the 56 studies report on change in disability/work comp)</small>	-32%

Source: Chapman, L., (2005). *Meta-Evaluation of Worksite Health Promotion Economic Return Studies: 2005 Update*. The American Journal of Health Promotion / The Art of Health Promotion, July/August 2005: 1-14.

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## COMPARISON RESULTS OVER 1<sup>ST</sup> 24 MONTHS PERCENT AT RISK

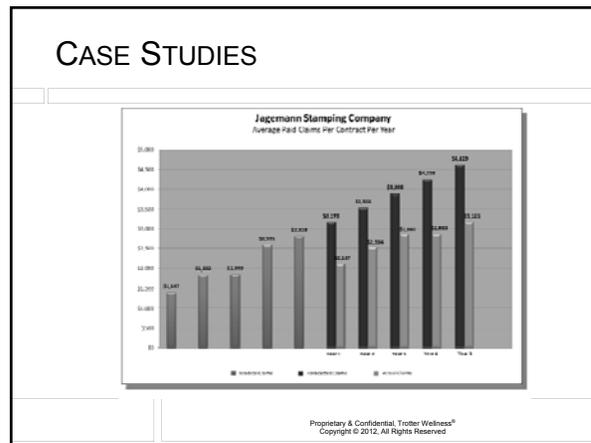
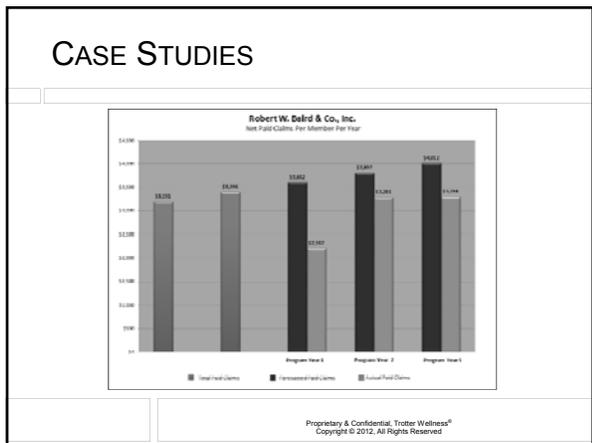
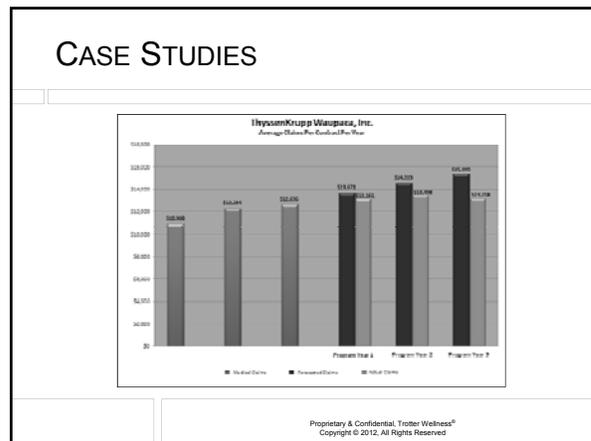
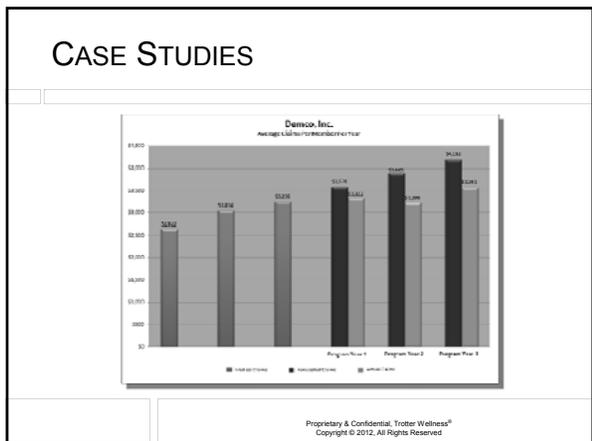
	Fitness	BMI	Smoking	Hypertension	Pre-Hypertension	Cholesterol	Nutrition	Pre-Diabetes
Initial HRA	78%	78%	22%	10%	39%	46%	89%	17%
End of Year 1	75%	64%	21%	6%	37%	43%	85%	16%
End of Year 2	68%	63%	20%	3%	35%	41%	74%	7%

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## METRICS DASHBOARD

- Employee Rollouts
- Biometric Participation
- HRA Completion
- Coaching Sessions Held
- Goals Set
- Behaviors Changed
- Materials Sent
- Referrals Made
- Satisfaction Surveys
- Health Claims
- Workers' Compensation Claims
- Short Term Disability
- Safety Record
- Absenteeism
- Employee Retention
- Long Term ROI

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- ### SUMMARY
- Program design and communications are vital for success
  - Wellness tools and resources educate about health risks
  - Health Coaching is the catalyst for behavior change and ultimately moves the numbers
  - Reporting and measurement validates the program's effectiveness
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### QUESTIONS

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