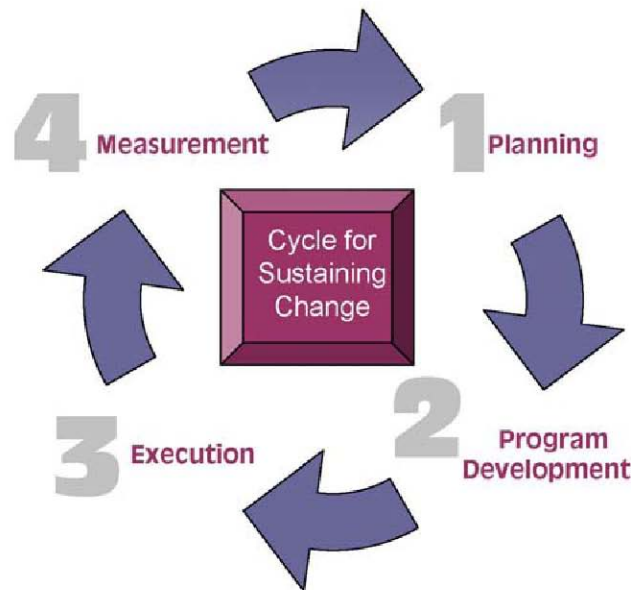


## Oakland County Wellness Coalition

# 10 Steps for Creating a Successful Health Management/Wellness Program

Whatever your company size or budget, there are things you can do to improve the health and productivity of your workforce. The following are 10 steps you should take to create and sustain change in the health of your workforce. Think of these steps as a cycle:



And one word of advice:

**You can't do it all at once – think BIG, start small and scale up over time!**

### 1. Identify Goals and Objectives

Start by asking questions like:

- Why is my company interested in creating a health management or wellness program?
- What do we hope to accomplish?
- What are the behaviors we want to encourage?

Then, set measurable goals to help guide the way. Whether it's healthcare cost savings, employee satisfaction or productivity, quantify it and measure it whenever possible. Be sure to set goals that are SMART – Specific, Measurable, Action-oriented, Realistic, and Time-based.

## **2. Evaluate Data to Identify Best Opportunities**

Companies who self-fund their medical benefits often look to past claims experience to help influence program design. Companies of all sizes should look at the demographics of their workforce and seek employee input through surveys or focus groups. It's important to design programs that match your organization's cost drivers, employee needs, and business culture. Questions to answer might include:

- What are the demographics of my employee population? How many males/females? What is the average age of my workforce?
- In terms of health care claims, what are the top issues? Do we have a large number of folks with chronic conditions or a fairly healthy workforce?

## **3. Quantify Resources**

When it comes to health and wellness programs it sometimes feels like “the sky is the limit” in terms of what we can do to make a difference. But let's be practical – every organization has limited resources. Your resources may include consultants to help develop and execute a multi-year strategy, health plan vendors who offer turn-key program design and communications or a passionate committee of staff volunteers who will plan and run workplace activities. Many health plans and insurance companies are now offering wellness resources and tools. Check with your plan providers to learn more about options available to you.

Whatever your approach, develop a “budget” of dollars and staff time for wellness and be sure to take advantage of community-based resources from voluntary agencies.

## **4. Develop the Business Case and Return-on-Investment**

Comprehensive health promotion programs have been proven to impact more than health care costs. A well-designed program has the potential to impact absenteeism, worker productivity, worker's compensation costs, employee turnover and company image.

Ask yourself the questions “How will we know if this program is a success? What metrics will our senior management look at to determine if this is a worthwhile investment?” Estimating ROI – whether it's hard-dollars such as claims costs or productivity costs or soft-dollars such as savings from reduced absenteeism or decreased turnover – and building the business case is a critical part of setting realistic expectations for what you can accomplish and securing management approval.

## 5. Secure Leadership Commitment

As you build your program it's important to understand that executive level support is critical to the success of any worksite health initiative. After all, it's the senior level executives who control the purse strings, the organizational agenda and all of the communication channels. And, don't be afraid to ask for personal commitments from your executive team – trust and credibility are compromised if employees feel that executives don't "walk the talk". Securing buy-in from leadership might include the following steps:

- Bring forward evidence on the business case. Data doesn't have to be bullet proof.
- Show how healthcare costs impact profits.
- Provide a well-developed plan that's ready to be implemented, including estimated resources and potential payback.
- Employers that have a tradition of employee safety and those who have six sigma processes are more likely to be receptive to hear the message you're bringing forward.

## 6. Develop a Communications Strategy to Foster Engagement

The core of a successful communication strategy is in taking people from awareness to action – getting employees interested in personal health and excited about what your company is doing about it. It's commonly accepted that there are five stages people go through when facing change:



To create and sustain change, a successful strategy must include building awareness, providing education and creating a supportive environment as well as providing resources and reinforcement for positive behavior change. Here are a few questions to ask when developing communications for your overall program or a program component:

- What is the purpose for communicating? What are you trying to communicate?
- Who is your target audience?
- What resources do you need? What resources do you have?
- What outcome or response are you looking for?



## **7. Identify Desired Behaviors & Develop Incentives**

A high level of employee participation is an indication of a “healthy” wellness program. The key for each organization is to identify what “participation” means, what actions you want people to take, and how to create incentives for them to “do the right thing”. Participation may mean completing a health risk assessment (HRA), taking part in wellness programs (e.g., smoking cessation, walking, yoga, nutrition, etc.) or working with a personal health coach.

Incentives are an important part of your strategy to initiate and maintain participation and may come in the form of prizes/merchandise, cash/gift cards, or benefit enhancements. Without some form of incentive, participation rarely exceeds 15%; with proper incentives, a good communication strategy and leadership support, you should be able to achieve 75-80% participation.



## **8. Start by Offering Free Health Risk Assessment**

A smart first step is to offer all employees a free, confidential health risk assessment (HRA). An HRA is a questionnaire employees complete by answering questions about their health history, lifestyle behaviors and health attitudes. The questionnaire typically takes about 15 minutes to complete and may be offered in hard copy or online (preferred method). Each participant receives a customized report, providing valuable information on their overall health status, whether any lifestyle habits are creating health risks and what steps to take to improve their health. They are then directed to the programs or services that can help them with the changes they want to make.

The employer receives information in aggregate form, which is valuable to assist decision-makers in planning and developing additional programs. It's critically important that participants understand that the HRA is administered by an independent outside company. If they don't trust the process and fear that their employer will have access to their personal health information, the program will surely fail.

One size does not fit all in the HRA industry. As a result, a wide variety of health risk assessments are available through various health promotion vendors. HRAs can be found in self-scoring formats, computer scannable formats and interactive online versions. The Business Section of the Michigan Surgeon General website ([www.michiganstepsup.org](http://www.michiganstepsup.org)) offers information on HRAs, a no-cost HRA and instructions on how to acquire a group number to allow your employees to complete the confidential HRA at no charge. The site tool will also allow the employee to request aggregate data reports.

## 9. Anchoring New Approaches in the Culture

If there's one thing we know it's this: supportive environments significantly increase the rate and sustainability of positive changes in health behavior. Overlooking this important step is often the difference between success and failure. Whether it's making changes in the cafeteria, taking the stairs instead of the elevator, or banning smoking in the workplace, think about the things you can do to create a supportive environment through your formal and informal policies and procedures. The Michigan Healthy Work Environments website offers a Designing Healthy Environments at Work tool to help guide your assessment of cultural support for healthy behaviors in the workplace. The tool is available at [www.mihealthtools.org/work](http://www.mihealthtools.org/work).

## 10. Evaluate Results and Lessons Learned

When you identified your goals and objectives did you identify the outcomes you were hoping to achieve? Larger companies often look to evaluate medical claims costs to see if “avoidable” costs were reduced? But companies of all sizes can look at three important measures to determine if they're on the path to success:

1. **Participation in the health risk assessment;**
2. **Percentage of the workforce identified as “low risk” from the HRA results; and**
3. **Employee satisfaction and self-reported improvement in their health.**

After gathering the above statistics, it is important to ask the following questions when preparing to plan for next steps: What programs, activities, etc. work well? What adjustments or changes could be made to improve results in the future? Review the Oakland County Wellness Coalition's [Objects of Interest in Evaluation](#) document for additional evaluation measures to consider.

By offering the HRA on a yearly basis, your organization will have ready access to good information it needs to track results and continue to refine the program to meet employee needs and maximize the company's investment.

Remember... Think **BIG**, start **small**, and scale **Up!**

For further questions or feedback on this document contact  
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