Implementing Corporate Wellness Programs

A BUSINESS APPROACH TO PROGRAM PLANNING

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Companies are taking increasing interest in the health of their employees. In 1991, corporations consumed about 25% of all health care resources, but paid almost 40% of the nation's health care costs (Chenoweth, 1992). Increasing evidence of the positive impact of health promotion programs at the worksite on medical cost containment (Christiansen, 1988; Erfurt, 1991; Foote, 1991; Fries, 1993; Leviton, 1989) as well as less tangible benefits, such as employee morale (Sloan, 1987; Warner, 1987), have galvanized corporations to implement worksite wellness programs. In a recent survey of employer coalitions, 75% reported having worksite wellness programs (A. Foster Higgins & Co., 1993).

The increasing number of corporate wellness programs is providing a new job niche for nurses. Occupational health nurses charged with implementing these programs usually have expertise in health education, epidemiology, and occupational health nursing. This expertise is usually obtained through advanced education in nursing or public health and clinical experiences in community health agencies or hospitals. In these settings, colleagues and supervisors are also health care professionals. When nurses move into business settings, however, their colleagues and supervisors are experts in business rather than health services. In these settings, nurses have skills and knowledge not well understood by others working in the corporate setting. Likewise, colleagues and supervisors working in the corporate setting have skills and knowledge not well understood by nurses (Dignan, 1992; O'Donnell, 1994).

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THE BUSINESS APPROACH

A business approach to corporate wellness program planning outlines the implementation plan using a format and language that is understood by business people, regardless of their product or service. This implementation plan is a "road map" that describes the envisioned wellness program and identifies steps that must be accomplished to start the program.

Because support of key decision makers is so critical to successful implementation of a corporate wellness program, the implementation plan must be understood by

persons without expertise in health services. Implementing a corporate wellness program using a business approach establishes a common language that can be understood by a variety of persons. It covers the essential components necessary to implement a corporate wellness program. The business approach ranges from general to specific, thus allowing flexibility and responsiveness to changes in program planning.

Using an approach that is understood by everyone in the organization helps ensure that the company's vision and overall strategic plan are reflected in the wellness program implementation plan. Nurses should be cognizant of such questions as: Where does the company see itself in 5 years? Ten years? Is this vision made explicit in writing? Is it accompanied by a strategic plan outlining steps to achieve the vision, thus assuring organizational survival and prosperity? What is the financial health of the company? Does it have the resources to accomplish the strategic plan? (Penburth-Valentine, 1984).

Integrating the company's vision and strategic plan into the wellness program implementation plan reflects commitment to organizational goals. Using a business approach to communicate this commitment also helps ensure support from other key decision makers in the company.

For these reasons, nurses must present program plans using a standardized business approach to program planning. Not only does this approach help ensure support, it promotes the exchange of information quickly and easily. It enhances communication, teamwork, efficiency, and coordination of responsibilities between departments—critical factors in today's business environment.

COMPONENTS OF THE BUSINESS PLAN

The basic components of the wellness program implementation plan using a business approach are the executive summary, purpose, background, ground rules, approach, requirements, scope of work, schedule, and financials.

Executive Summary

The executive summary is a brief synopsis of the program plan. This synopsis should briefly summarize all aspects of the plan, including the projected return on investment. An example of such a statement is "In summary, we believe this plan is a viable project with the initial investment of *W* recouped within *X* years and at a cost avoidance of *Y* within Z years." In addition, this statement should be qualified according to the assumptions used to project the return on investment.

Purpose

The purpose is straightforward and identifies the objective(s) to be accomplished by the plan. For example,

> Our plan is to provide an affordable and timely approach to implementing a corporate wellness program that will provide opportunities for employees to lead healthier lives and contribute to the company's overall efforts to enhance quality of working life for employees, increase productivity, and contain medical costs and utilization.

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Background

The background section identifies critical incidents in the history of program development that justify the new wellness program. This section should also contain a succinct literature review of the epidemiologic, lifestyle intervention, health services utilization, and health care economics research that links high risk behaviors to adverse health outcomes and high health care costs. Background statements include functional or technical requirements that led to the purpose of the plan; problems, concerns, and/or previous efforts; and management direction that may be required to implement the plan.

Following are questions that can be used to develop background statements for implementing a corporate wellness program.

- What are existing company resources that impact employee health? For example, many companies have an occupational health clinic, a safety department, an employee assistance program, a comprehensive medical benefit plan, and an employee recreational program. These resources, though not specifically addressing employee wellness, do enhance employees' quality of working life and provide potential resources for corporate wellness programs.
- Has the impact of these current resources on employee productivity and/or health ever been measured? If resources allow, an organization may conduct a feasibility study for a wellness program that addresses this issue.
- What is the plan for integrating existing resources with the new wellness program? Often these resources may not be adequately integrated to support specific employee wellness issues. For example, these resources may be under different departments and/or they may not have a comprehensive approach to health services that includes prevention.
- What are the trends for medical costs and utilization? How do they benchmark with comparable companies? What strategies has the company instituted (e.g., managed care) to help offset these trends?
- Has executive management approved the wellness program? If yes, understand the rationale for their approval. The rationale could cover diverse reasons such as containing medical care costs, enhancing employee productivity, or improving employees' quality of working life. If the implementation plan is yet to be presented to management, include a section on what is needed from

TABLE 1

Approach to a Corporate Wellness Program

Component	*Priority*	*Products/Services*
Program planning	Immediate (1 to 6 months)	Written implementation plan
Baseline data	High (1 to 3 years)	Health risk appraisal program Integrated health management database
Health intervention programs	High (1 to 3 years)	Health intervention programs for high, moderate, and low risk employees and families
Incentives	High (1 to 3 years)	Prizes, rewards, rebates for participants provide immediate recognition
		Possible flex time policy and risk related insurance plan for participants provide long term reinforcement for successful and/or sustained efforts to alter high risk lifestyles
Evaluation	Medium (3 to 5 years)	Process evaluation: programs are measured during implementation, and feedback is used to continually improve the product and/or service
		Impact evaluation: short term impact of program is measured assessing changes in self efficacy and health knowledge, attitudes, awareness, and beliefs
		Outcome evaluation: long term impact is measured by assessing changes in initiation and maintenance of positive behaviors and impact on medical costs and utilization
Administration	High (1 to 3 years)	Wellness program planned, managed, and evaluated
		Staff knowledge and skills measured against planned wellness program outcomes

them, such as additional labor or non-labor resources or a management directive to other departments supporting the proposed wellness program.

- Is there infrastructure support for the wellness program? Is there current space and staff available to support the new program?

Ground Rules

Ground rules are the non-negotiable program parameters. They provide guidelines for the plan. More specifically, ground rules identify constraints and limitations, special considerations, terminology definition, and resource considerations.

The following questions guide identification of ground rules for the wellness program.

- Is there a company initiative that supports this new program? Is the company interested in promoting employee health and well being to assist in health care cost containment and/or to improve quality of working life for employees? This level of support may be assessed through an analysis of the organizational culture, including interviews and focus groups with executive management as well as staff. Willingness of executive management to publicly support the wellness program is another indicator. At one company, the president made a video promoting the benefits of the wellness program and encouraged employee participation in the voluntary health risk appraisal program offered to employees during work time. Following the health risk appraisal, this company also provided opportunities during work time for high risk employees to voluntarily participate in wellness education and supervised exercise programs. Historical analysis of company efforts to increase quality of working life for employees can also provide evidence of overall organizational support.
- How will customer requirements drive the products and services of the health promotion program? Will employee input be obtained through focus groups, advi-

sory boards, needs assessment surveys, or health risk appraisals?

- How much and for how long is the wellness program budgeted?
- Who are the primary target groups—employees only or employees and their families?
- Are there "company rules" that would impact wellness program implementation? For example, manufacturing facilities often "run on the clock." A strict time charging policy may mandate that programs only be offered during lunch or after work hours. In this case, an option might be that high risk employees receive a specific allotment of work time to use weekly or monthly to attend health education programs much the same that employees are granted work time to attend training and development classes.
- Does the proposed program have a commitment to organizational change as well as individual change? Will health policy changes that impact employee health (e.g., a smoke free facility mandate) be given high priority as well as individual employee health changes?
- Is the program voluntary, or will certain high risk employee groups be required to participate in health education programs?
- Do company products and/or location require high security zoning policies? This might curtail the availability and accessibility of health education programs to certain employees and/or families.
- How centralized is the proposed wellness program? Will the program be taken to employees or will employees be expected to attend at a particular location (e.g., a wellness center or fitness facility)?

Approach

The approach introduces processes for actual implementation of the program. It identifies critical milestones that must be accomplished to implement the program. As seen in Table 1, six components for a corporate wellness program are proposed: program planning, baseline data, health intervention programs, incentives, evaluation, and administration. Priority for implementation and products and services are also outlined. For example, the component, "program planning," has immediate priority and identifies a written implementation plan as the product. Table 1 provides the global approach—a macro perspective—of the corporate wellness program. Table 1 outlines the global approach to operationalization of a multifaceted wellness program that is implementing many activities within a short time in a form that is readily available and understood.

Requirements

Requirements identify what the plan must do once it is issued. They are the expected outcomes that must be accomplished as a result of performance. In other words, requirements identify the success criteria for each program component. Table 2 outlines the expected outcomes for each wellness program component identified in the approach described in Table 1. For example, one outcome identified under the component, "baseline data," specifies that both biometric and self reported health status data

TABLE 2

Requirements for a Corporate Wellness Program

Program planning

Enables wellness program implementation on schedule, at cost.

Baseline data

Contain both self reported and biometric employee health status information.

Integrate health risk appraisal database with other existing databases into an integrated health management database.

Health intervention programs

Institute health intervention programs that:

- Identify employees and their families as target populations.
- Promote positive changes in self efficacy; health knowledge; attitudes; awareness; beliefs; and behaviors in high, moderate, and low risk employees and families.
- Promote containment of long term medical costs and utilization.
- Use a variety of teaching-learning processes at the individual, classroom, and mass media levels.
- Are empirically based according to needs identified from baseline data.
- Include marketing and promotion as an integral part of each program.

Incentives

Increase customer satisfaction.

Increase participation rates.

Evaluation

Measures changes in self efficacy, health knowledge, awareness, attitudes, and beliefs for wellness program participants compared to non-participants

Measures changes in behavior for wellness program participants compared to non-participants

Measures changes in medical costs and utilization for wellness program participants compared to non-participants

Administration

Sees to continued survival of wellness program

Ensures that staff knowledge and skills are consistent with wellness program requirements

Trains and develops staff with high level work and planning skills

Supports staff licensure and certification

Obtains adequate work space and equipment for staff

Obtains adequate work space and equipment for wellness program participants.

IN SUMMARY

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1. Support of key decision makers is critical to the successful implementation of a corporate wellness program. Therefore, the program implementation plan must be communicated in a format and language readily understood by business people.
2. A business approach to corporate wellness program planning provides a standardized way to communicate the implementation plan.
3. A business approach incorporates the program planning components in a format that ranges from general to specific. This approach allows for flexibility and responsiveness to changes in program planning.
4. Components of the business approach are the executive summary, purpose, background, ground rules, approach, requirements, scope of work, schedule, and financials.

will be obtained from employees. Therefore, for baseline data to be successfully completed, both self reported and biometric health status data must be collected. Program planners for other wellness programs might choose to include only self reported baseline health status data, excluding or making optional the biometric information. Requirements can be as technical as the plan requires. When necessary, requirements also include predicted future operating requirements, necessary changes in the way of doing business as a result of the program, and information to other departments or agencies about how the plan may affect them once it is implemented.

Scope of Work

The scope of work defines the action plans to be accomplished in implementing the plan. For wellness program implementation, it is the necessary activities required to satisfy the plan's requirements (or objectives). For example, the wellness program component "health intervention programs" can be broken into separate activities with frequency, required resources, and projected annual costs identified. The scope of work would also include related activities that are required to implement the program, such as special training needs, and concurrent company events, such as annual business reviews, that may impact wellness program implementation.

Schedule

The schedule provides target dates for each component of program implementation, with a summary timeline showing when event milestones are to be achieved. Persons responsible for each program are also identified and dates of related activities and concurrent events that impact programs can also be noted. More detailed timelines can be developed for each individual program.

Financials

For the purposes of the wellness program plan, the financials could be a profit and loss statement, sometimes called an income statement, calculated from the following equation:

cost avoidance − expenses = net profit

Expenses include all labor and non-labor program costs such as equipment, supplies, salaries, benefits, administrative costs, marketing, and overhead. An accurate projection of costs, using historical data, published resources, and information from other companies, greatly strengthens the plan and demonstrates to key decision makers that one is serious about the company's "bottom line."

SUMMARY

Nurses in charge of corporate wellness programs must obtain support from key decision makers in the organization. These decision makers allocate resources critical to the success of the wellness program. Therefore, communicating plans in a language that decision makers understand is crucial. Using a business approach to implement corporate wellness programs helps ensure that the program plan will be understood by everyone in the organization. This understanding will promote education, collaboration, and communication—factors that have a powerful impact on program success.

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