

Indiana State HR
Conference
Workforce Engagement Strategies
August 31, 2011



Presenters

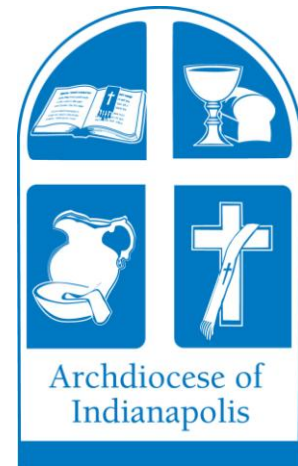
Apex Benefits

- Vanessa Brown,
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Archdiocese of Indianapolis

- Edward Isakson, Director of Human Resources
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Monarch Beverage

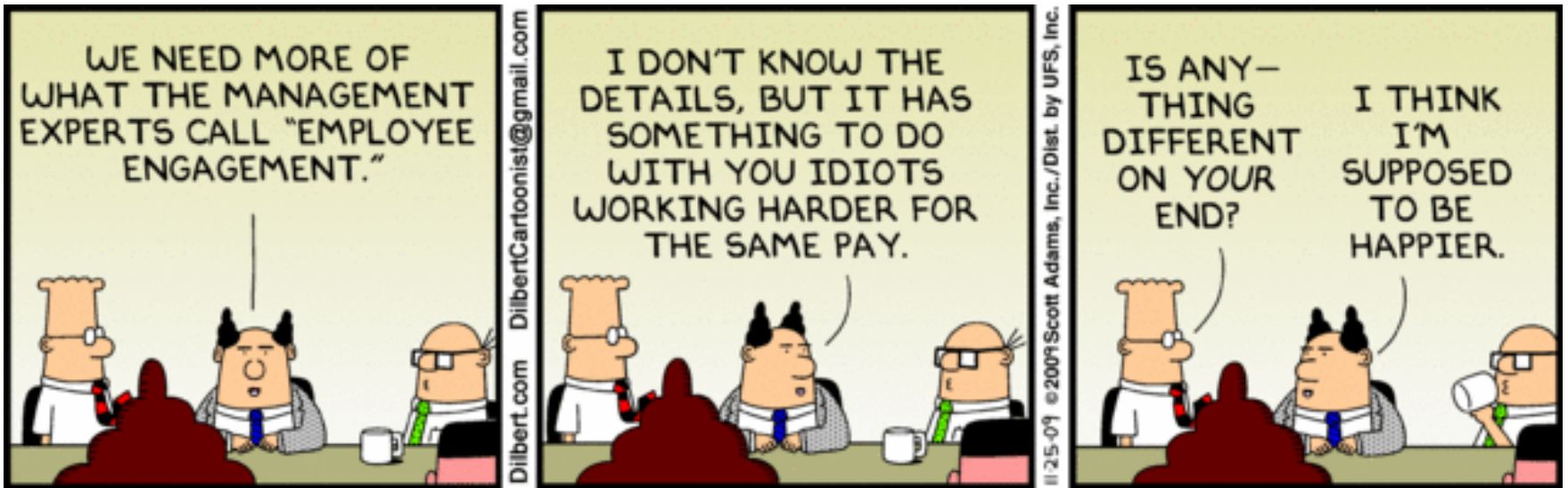
- Natalie Roberts,
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Agenda

- Workforce Engagement
- Transformation of Health & Wellness Program
Edward Isakson, Archdiocese of Indianapolis
- Innovative Wellness Strategies
Natalie Roberts, Monarch Beverage
- Wrap Up & Questions

Employee Engagement – Dilbert Style!



Workforce Engagement

According to published figures from *The Gallup Organization*, the American workforce is:

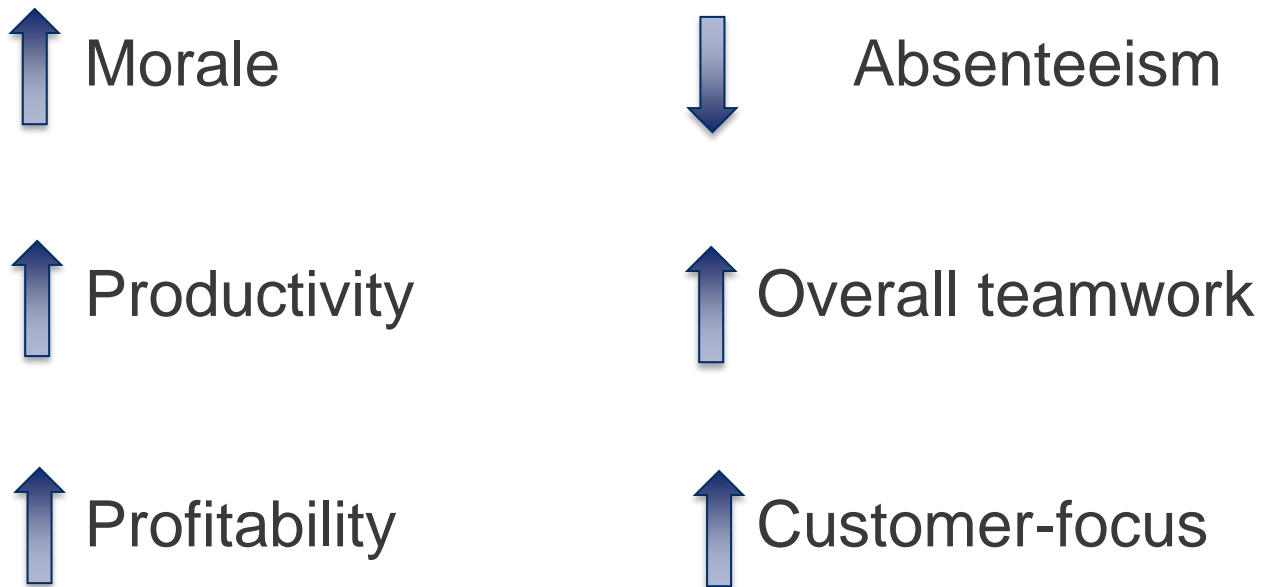
- 29% *Engaged* employees
- 55% who are *Not-Engaged* and
- 16% who are *Actively Disengaged*



Total of 71% of the workforce who are not “switched-on” while at work, are not paying full attention, or may even be working against the organization’s goals.

Workforce Engagement Value

Top-performing organizations know employee engagement is a force that drives business outcomes.



**Associate engagement goes beyond an HR initiative...
it truly is *a way to do business***

Archdiocese of Indianapolis

- 151 parishes, 71 schools, six Catholic Charities agencies and many offices of ministry across central and southern Indiana
- 2,500 benefits eligible employees
- **Mission:** *We commit ourselves to generosity and to the responsible use of our spiritual and material resources*

Health and Wellness Transformation

Need for change:

Challenges:

- Budget limitations - faced with need to be more financially efficient and find cost savings
- Employee retention and satisfaction

To meet the challenges:

- Options considered
- Focused on health and wellness design
- Built a healthcare strategy

Health and Wellness Transformation

Healthcare Strategy

- **Protect** people from catastrophic healthcare costs
- **Provide** funding for healthcare expense
- **Partner** with the best healthcare companies and advisors
- **Promote** good health to improve quality of life

Solution

Healthcare Strategy and Solution

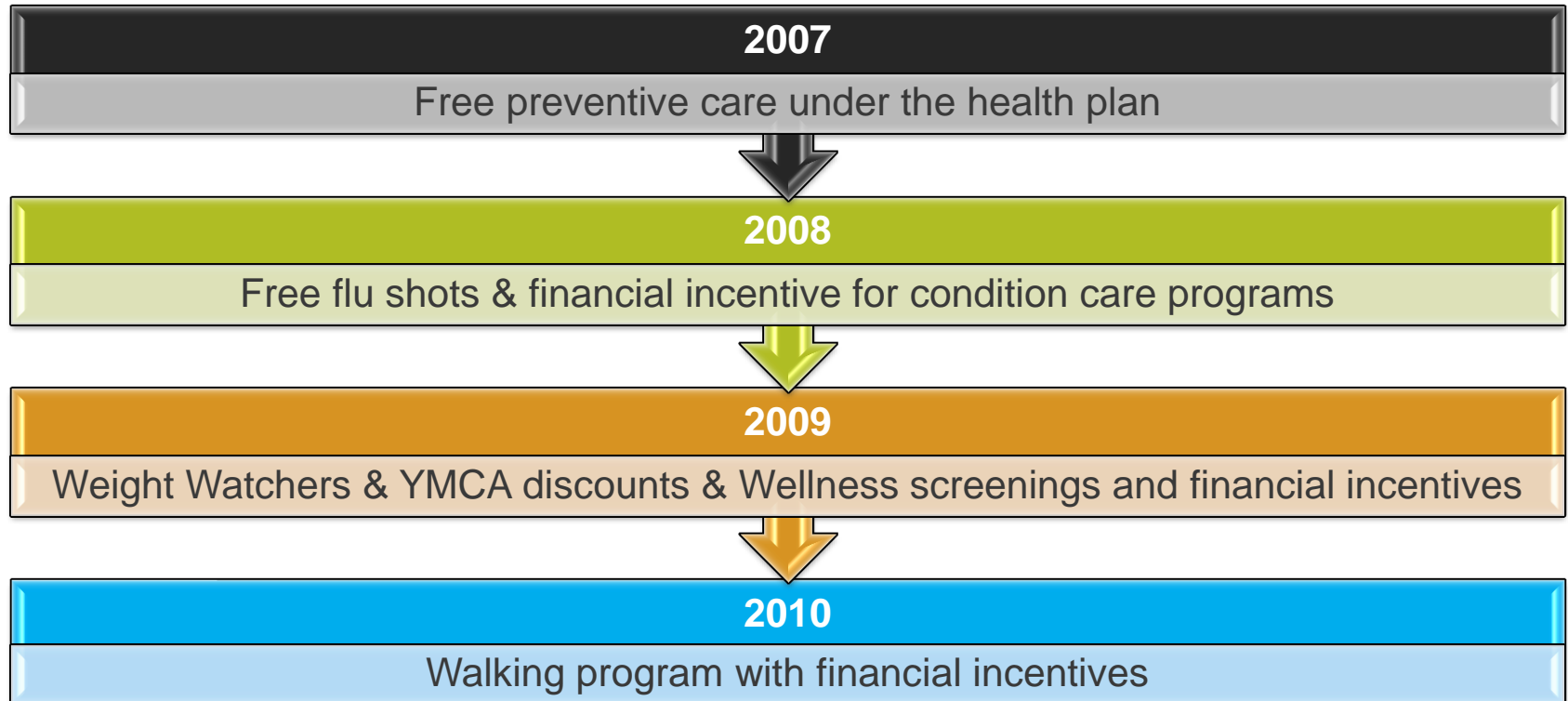
- **Protect:** full-replacement of traditional plan with HDHP
- **Provide:** employer-funded HSA
- **Partner:** linkages to valued-added organizations
- **Promote:** wellness programs with financial incentives

Partnerships with “Best in Class”

- Apex Benefits Group: health benefits expertise
- Anthem: medical, dental and vision
- Teachers Credit Union: HSAs
- CHC Wellness: comprehensive health promotions
- St. Vincent: EAP
- Sosa Group and Clarification: communications
- Best Doctors: free medical consultation
- Health Advocate: benefits gateway, core advocacy
- Healthcare Blue Book: healthcare cost/quality

Integrated Health and Wellness

- **Researched and built a Business Case for Wellness**
- **Implemented a Wellness Program**



Results

- Three years of no premium increases or plan changes
- “premium holidays” for parishes and schools
- Bonus HSA contributions for employees
- Benefits endowment of \$10 million
- HSA balances exceed \$4 million
- 52% of high-risk population moved to medium or low risk

Questions



Monarch Beverage

- Indiana's largest distributor of beer and wine, representing more than 500 of the world's best brands
- Demographics of our employees
 - 650 employees - 50% Sales & Administrative/50% Operations (Drivers & Materials Handler's), 90% of jobs are physical and 90% Male
 - Average age is mid to late 30s
 - Majority of employees based in Indianapolis with 75% on the road everyday conducting business
- **Mission:** *Monarch Beverage's reason for being is to efficiently provide an ever-escalating standard of service to its customers and to responsibly enhance demand for its products.*

Challenges/ Opportunities

Young
Competitive
Predominately men
Type A personalities
In the beer business
Work hard
Long days - long hours
Limited access to healthy choices

Wellness Strategy Solutions

Know your employees and understand your company culture

- Demographics
- Workplace environment
- Attitude Survey: Current & New Benefits, Motivation
- Health Risk Appraisal: Biometrics, Lifestyle, Readiness for change

Create a “wellness culture” that reinforces desired behavior changes

- Engage all levels of management
- Create a communication strategy
- Educate your employees
- Evaluate your policies

Wellness Strategy Solutions

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Create a “wellness culture” that reinforces desired behavior changes

- Engage all levels of management
- Create a communication strategy
- Emphasize the importance of confidentiality and HIPAA compliance
- Educate your employees and policies

Design, implement, communicate, reinforce and re-evaluate the most effective programs to engage **YOUR** employees!

Wellness Strategy Solutions

Health Action
Programs

Health
Awareness
Campaigns

Health
Coaching

Health &
Human
Capital
Management

Health Action Programs

Initiatives focused on modifying behaviors:

- **Group Activities:** Biggest Loser Challenge, Mini Marathon Challenge, Back On Your Bike and Corporate Challenge
- **Company initiatives:** Focused on physical activity with Weight Watchers (50% reimbursement) and Fitness reimbursement (50% reimbursement up to \$250 per family)
- **Focused on high risk behavior:** Tobacco cessation (50% reimbursement) and drinking and driving program
- **Focused on nutrition:** Free fruit daily
- **Focused on work life balance & lifestyle management :** EAP, Free access to CPA, Lawyer and financial consulting, Monarch Charitable Foundation, Flexible work schedules and Employee Appreciation programs
- **Focused on Safety:** Monthly safety awareness topics, stretching programs, ergonomics assessments and proper lifting techniques



Must maintain on-going
Education & Communications

Health Awareness Campaigns

Provide education on specific health risks

- Tobacco cessation
- Physical activity
- Nutrition
- Alcohol awareness
- Breast Cancer awareness
- Colon Cancer awareness
- Heart disease
- Diabetes
- Stress management
- Sleep disorders
- Well baby
- Consumerism: MAP, Health care utilization cost facts, Nurse hotline, On-line resources and RX program

Health Coaching

Provide individual coaching for moderate to high risk health related issues targeted through detailed data mining from our key partners:

- Health insurance TPA
- Work Comp TPA
- Employee Assistant Program
- On-site clinic

Health and Human Capital Management

Designed to hire and retain healthy employees that are physically capable of performing the essential functions of the job

- **Recruiting**

- Post offer Functional Job Testing, safety behavioral assessment tests

- **Retention**

- Health Risk Appraisals & biometric screenings
- Work conditioning & wellness goals
- On-site medical clinic
- Physical therapists and physical therapist assistants
- Benefit plan: Plan design, Incentives, Free prescriptions, Medical Advocate
- Fitness facility
- Physical ability testing
- Short term disability management
- Workman's compensation management

Lessons Learned

- Communicate vision – early and often
- Partner together to build the plan in advance
- Create Metrics and then analyze the data
- Never be afraid to think outside the box
- Third party vendor partnerships
 - Match your culture with vendor

JUST
START!

Next Steps- Engagement of Workforce

- **Focus on understanding the challenges first**
 - Review and analyze
 - Assess your current approach/program/process
 - Identify challenges, then evaluate benefits
- **Communicate the challenge correctly**
 - Identify executive sponsors for project
 - Identify stakeholders
 - Communication is critical to success – explain the “why” to employees; tell the story REPEATEDLY
- **Recognize there is a broad range of solutions**
 - Implement what is right for your employer, culture and employees
 - Use due diligence and partnerships to identify the best solution

Questions – Monarch Beverage



Wrap Up

Make employee engagement a priority with a focus on:

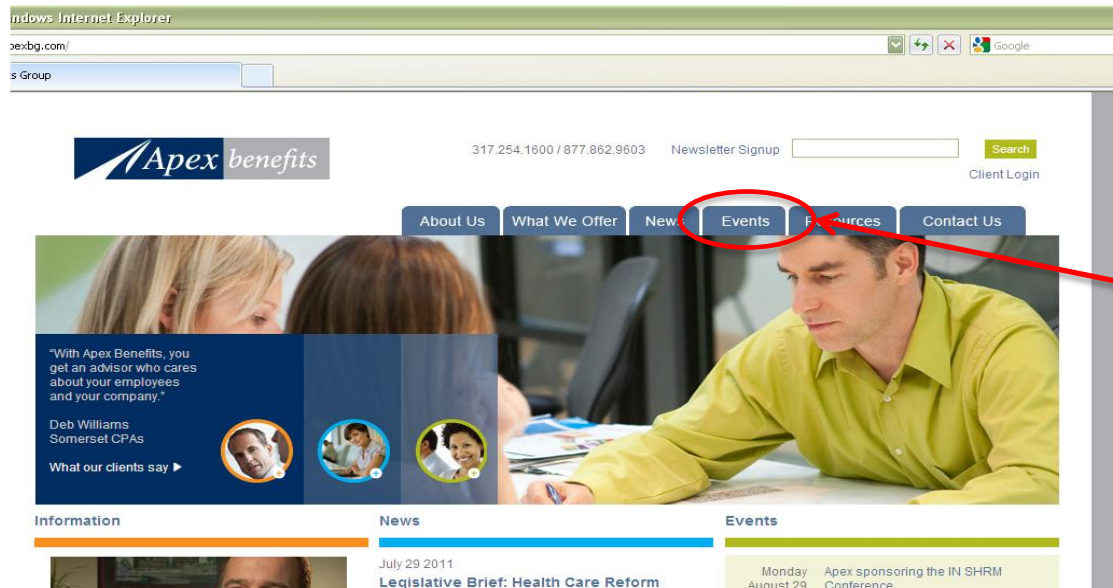
- Strategy – develop a formula for success, finding the right people and keeping them engaged
- Accountability & Performance –define success measures to help all parties focus on outcomes & results
- Communication – cultural alignment between employees & company as well as activities and goals
- Development – create a platform for employee development, internal and external opportunities with a path for current and future leaders

Top performing companies understand the value of building an employee engagement strategy and linking it to the achievement of corporate goals will help them win in the marketplace.

Thank You!

- Thank you to Ed & Natalie for your expertise and time
- Presentation handout is available on our website at:

<http://www.apexbg.com>



Click on Events and note the SHRM conference reference

- Watch our website for details about our upcoming November roundtable