

ACHIEVING ROI for WELLNESS

Measuring and Quantifying the Value of Health Promotion and Worksite Wellness

October 23-25, 2006 • Hilton San Diego Resort • San Diego, CA

Hear proven success strategies for calculating ROI and demonstrating quantifiable cost savings and improved health outcomes for your workforce or population. By attending this conference you will specifically learn how to:

- **Measure** the economic impact of health promotion and worksite wellness programs
- **Calculate** ROI to demonstrate the financial value of having a healthy workforce
- **Quantify** the value of health promotion and worksite wellness by demonstrating improved population health outcomes
- **Develop** metrics and processes that can be applied to establish the link between worksite wellness programs and healthcare costs
- **Link** health promotion initiatives, disease management and preventive medical care to develop an all-encompassing wellness strategy
- **Gain** high levels of participation to create a true culture of wellness and good health within your organization
- **Earn** senior management's endorsement of health promotion and worksite wellness
- **Utilize** incentives to gain organization wide participation for health promotion initiatives
- **Obtain** organization wide support for worksite wellness initiatives to create a true culture of wellness within your organization
- **Change** the behaviors of your unhealthy "at-risk" employees to drive health improvement
- **Discover** what your organization must be aware of regarding HIPAA compliance regulations and the collection of employee health data and utilization of incentives and disincentives for health promotion purposes

Hear proven strategies for success and in-depth case studies for success from the industry's leading health promotion and worksite wellness leaders:

KEYNOTE PRESENTATION



Seven Ways to Demonstrate ROI: A Sherpa Model for Winning Senior Management Support
Michael Samuelson

Vice President of Health and Wellness

BLUE CROSS BLUE SHIELD OF RHODE ISLAND

FEATURED "HOW-TO" LEARNING SESSION



Calculating ROI for Health Promotion and Wellness: Measuring and Demonstrating Real Cost Savings and Improved Population

Health Outcomes

Ron Z. Goetzel, PhD

Director

**INSTITUTE FOR HEALTH AND PRODUCTIVITY STUDIES
CORNELL UNIVERSITY**



Comprehensive Worksite Health Promotion Programs That Reduce Health Risks and Costs
Nico Pronk, PhD, MA, FACSM

Executive Director, HealthPartners Health Behavior Group, Vice President, Health and Disease Management

HEALTHPARTNERS



Demonstrating a 16:1 ROI for Workplace Health Promotion Programs
Steve Aldana, PhD

Professor of Health Performance

BRIGHAM YOUNG UNIVERSITY

Employee Wellness: Maximizing Human Capital Lessons Learned and Real Cost Saving Results Achieved
**WASHOE COUNTY SCHOOL DISTRICT
RENO, NV**

Aligning Metrics and Health Management With Your Business Strategy

**PIONEER HI-BRED INTERNATIONAL, INC.
A DUPONT COMPANY**

Improving Population Health Outcomes By Leveraging Incentives to Drive Healthy Behavior Changes and Engage Employee in Weight Management Initiatives
MICROSOFT

The Vermont Worksite Wellness Project: A Collaborative Worksite Wellness Initiative Between BlueCross BlueShield of Vermont and UVM

UNIVERSITY OF VERMONT

Health Outcomes From Two Successful Health Promotion Initiatives at Blue Cross Blue Shield of Massachusetts
BLUE CROSS BLUE SHIELD OF MASSACHUSETTS

Creating a Culture of Health: Producing Measurably Better Health for Employees

PFIZER

Critical Considerations in Developing and Implementing an On-Site Health Promotion Program for Employees
BLUE CROSS BLUE SHIELD OF NORTH CAROLINA

Positive Outcomes Generated by Onsite Health Promotion Efforts – A Case Study of Mutual of Omaha's Wellness Program

MUTUAL OF OMAHA

Gaining Senior Management Support and Developing the Infrastructure Within Your Organization to Optimize Health Promotion and Well-Being Initiatives

INTEL CORPORATION

Health Promotion, HIPAA and Inherent Legal Risks Employers and Health Plans Must Be Aware of Regarding Privacy Concerns and the Utilization of Health Rewards and Punitive Disincentives

MCDERMOTT, WILL & EMERY, LLP

DON'T MISS OUR IN-DEPTH, INTERACTIVE WORKSHOP SESSIONS

An In-Depth Look at the Economic Evidence for Worksite Wellness: "Show Me the Money!"
SUMMEX HEALTH MANAGEMENT

Gaining High Levels of Participation for Your Health Promotion and Wellness Programs to Drive Meaningful Change and Results
MEDFIT CORPORATE SERVICES

Quantifying the Health, Economic and Human Capital Impact of Health Improvement Initiatives
HARRIS HEALTHTRENDS, INC.

Dear Health Professional,

According to the Centers for Disease Control and Prevention, preventable illnesses and medical conditions comprise approximately 80% of the burden of all illnesses and 90% of all healthcare costs. What are you doing to change this glaring statistic?

It's a staggering and eye-opening statistic that gives tremendous credence to the implementation and development of health promotion and worksite wellness initiatives. Health plans and employers, particularly those that are self-insured, are now turning to health promotion and worksite wellness as a viable and cost effective means for addressing the exorbitant costs that go hand-in-hand with treating chronic medical conditions caused by unhealthy lifestyles and behaviors.

For payers of health benefits, health promotion and worksite wellness represent a much needed "intervention" for their employees and population members whose sedentary lifestyles and unhealthy habits put them at risk for developing life threatening health problems and costly medical conditions.

One of the key challenges to effectively launching a worksite wellness initiative, however, is successfully gaining the buy-in of senior level financial decisions makers whose approval will primarily hinge on whether or not worksite wellness will yield a genuine return-on-investment (ROI).

A positive ROI for health promotion initiatives most certainly can be demonstrated.

To address this challenge, World Research Group is proud to present its first conference on **ROI Wellness**, taking place October 23–25, 2006, at the Hilton Resort in San Diego, California. The conference will spotlight those organizations that are raising the bar and setting new standards of excellence when it comes to developing and fostering healthy employee populations.

By attending this conference you will learn specifically how to:

- **Measure** the economic impact of health promotion and worksite wellness
- **Calculate** ROI to demonstrate the financial value of having a healthy workforce
- **Quantify** the value of health promotion and worksite wellness by demonstrating improved population health outcomes
- **Link** health promotion initiatives, disease management and preventive medical care to develop an all-encompassing wellness strategy
- **Gain** high levels of participation to create a true culture of wellness and good health within your organization

Learn Directly From Proven Health Promotion and Worksite Wellness Leaders

Learn how:

- **Steve Aldana, PhD of Brigham Young University** has demonstrated a return-on-investment of \$16 for every \$1 spent on health promotion in the workplace
- **Michael Samuelson of Blue Cross Blue Shield of Rhode Island** has developed a broader definition of ROI using quantitative and qualitative measurements that include both long and short-term goals
- **Ron Goetzel, PhD of the Cornell University, Institute for Health and Productivity Studies** leverages methods used to measure program health and financial impact including return on investment (ROI)
- **Nico Pronk, PhD, of HealthPartners** describes the role incentives play in attaining high participation levels for health improvement programs and their outcomes in terms of financial ROI and changing health behaviors
- **Blue Cross Blue Shield of North Carolina** vigorously promotes healthy lifestyles to its members and employees using a wide variety of tools and incentives
- **Blue Cross Blue Shield of Massachusetts** utilizes health risk assessments and predictive modeling to identify its at-risk members and provide timely and appropriate health intervention to mitigate risk factors
- **Mutual of Omaha** has achieved positive outcomes generated by its onsite health promotion efforts

Register today to reserve your seat at the conference and take advantage of early bird discounts! Attend with your colleagues and qualify for an additional team discount – Register 3 and the 4th goes free!

Who Should Attend

- Chief Executive Officers
- Chief Medical Officers
- Medical Directors

Vice Presidents and Directors of responsible for:

- Health Promotion
- Worksite Wellness
- Health Risk Assessment
- Health Improvement
- Disease Management
- Health and Productivity
- Health and Welfare
- Health Behaviors
- Medical Affairs
- Health Management
- Product Development
- Medical Management

From: Employers, Health Plans, and Managed Care Organizations

This conference holds significant value for Vice Presidents, Directors and Managers of:

- Health Benefits
- Benefits Administration
- Human Resources
- Organizational Development

Team participation is highly encouraged. Register 3 and the 4th is free!

DAY ONE • TUESDAY, OCTOBER 24, 2006

7:00 Registration and Continental Breakfast

7:45 Opening Remarks from the Chair

KEYNOTE PRESENTATION

8:00 **Seven Ways to Demonstrate ROI: A Sherpa Model for Winning Senior Management Support**

Showing a return on investment for worksite wellness programming is quickly becoming a vital necessity for health plans and employers alike. While showing a reduction in claims cost by decreasing utilization is the gold standard for demonstrating ROI, there are many short and long-term objectives that can be met and exceeded if you assume the role of "the Sherpa" and deliver a well executed strategy that results in a viable set of financial and improved population health outcomes.

In this keynote presentation, nationally recognized speaker, author and health promotion expert Michael Samuelson will share 30

years of success in identifying and meeting the expectations of senior management through proven health management solutions, including:

- The expanding new role health promotion plays in addressing rising health care costs for both employers and health plans
- A broader definition of ROI using quantitative and qualitative measurements that include both long and short-term goals
- Applying the Sherpa model to gain the support of the economic and technical buyers
- A long-term plan for creating a true culture of health and wellness within an organization



Michael H. Samuelson is the *Vice President of Health and Wellness Services* for **BLUE CROSS BLUE SHIELD OF RHODE ISLAND**. After more than three decades as an author, university lecturer and a health industry innovator, Michael continues to influence and guide the steady movement away from paternalistic and reactive medicine towards a system of shared medical responsibility and strong individual accountability. From his seat as a health promotion pioneer in the early 1970s to his current

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position as a senior management executive for Blue Cross & Blue Shield of Rhode Island, he knows the story from all angles. He's been there and he's anxious to share lessons learned from the past, the exciting approach his team is taking at Blue Cross & Blue Shield of Rhode Island and where he sees prevention and health promotion will be tomorrow.



IN-DEPTH, "HOW-TO" LEARNING SESSION

9:00 **Calculating ROI for Health Promotion and Wellness: Measuring and Demonstrating Real Cost Savings and Improved Population Health Outcomes**

Is investing in health promotion and employee wellness a wise business decision? Until recently, health promotion program advocates were at a loss when challenged to produce an economic argument for their programs. But, times are changing. This session will synthesize what is known, what is still under discussion and debate, and what is yet to be learned about the financial impact of health promotion. Recently, the evidence supporting a return on investment (ROI) has been mounting. Nearly 100 studies conducted over the past 20 years have examined the economics of health promotion. Much of that evidence was recently compiled in the American Journal of Health Promotion and a special report prepared for the Institute of Medicine (IOM). These reports helped organize the current evidence regarding the "business case" for health promotion and wellness. The session will offer evidence supporting the following points:

- A large proportion of diseases and disorders are preventable
- Modifiable health risk factors are precursors to many of diseases, disorders, and premature death
- Many modifiable health risks are associated with increased healthcare costs within a short time window
- Modifiable health risks can be improved through effective health promotion programs;
- Improvements in the health risk profile of a population can lead to reductions in health costs
- Well designed programs can be cost/beneficial – they can save more money than they cost, thus producing a positive ROI

Primary learning objectives of this session include:

- Describing methods used to measure program health and financial impact, and in particular return on investment (ROI)
- Describing a body of research that has quantified the financial consequences of poor health on medical care expenditures and productivity outcomes
- Defining a process for instituting successful health promotion programs – a) diagnosis, b) strategic/tactical planning, c) intervention, and d) evaluation
- Identifying the key ingredients for successful health promotion programming



Ron Z. Goetzel, PhD

Director

**INSTITUTE FOR HEALTH AND PRODUCTIVITY STUDIES
CORNELL UNIVERSITY**



10:00 *Networking Refreshment Break*

10:30 **Employee Wellness: Maximizing Human Capital Lessons Learned and Real Cost Saving Results Achieved**

With over a decade of wellness programming experience involving thousands of members consistently, the Washoe County School District Wellness Program has learned valuable lessons in educating, engaging and empowering busy adults. Real results are having a profound impact both financially and culturally. Regardless of health risk factors, healthy behavior adherence is at the core of high participation rates and has produced one of the highest ROI's ever published for a wellness program. Maximizing 21st century technology has made the WCSD's successful models scalable and replicable. Participants will be given the opportunity to become demo members of the WCSD Wellness Program, including:

- Obtaining high levels of participation



- Demonstrating real ROI for wellness programs
- Creating a culture of wellness within your organization

Aaron Hardy, MS

Wellness Coordinator

**WASHOE COUNTY SCHOOL DISTRICT
RENO, NV**



11:15 **The Truth About ROI and Worksite Health Promotion Programs**

Companies are always looking for ways to reduce employee-related expenses and many corporations and organizations are using health promotion programs as a reactionary effort to curtail ever-increasing, employee-related expenses of health care and lost productivity. Dozens of published scientific research articles have evaluated the cost-benefit of worksite health promotion programs and the majority show a clear and positive return-on-investment. Yet, many companies are hesitant to spend any money on employee health promotion efforts, raising the question as to why most health and wellness programs still struggle to get funding and support? Health promotion in the workplace can not only have a positive effect on your employees' waistlines, but also a positive impact on your organization's bottom line. During this in-depth session, learn how new information gained by researchers at Brigham and Young University provides additional evidence on why companies and public sector organizations should adopt worksite wellness programs to help their employees lead healthy lifestyles and how, by doing so, they can achieve and demonstrate a genuine return-on-investment (ROI). During this session, leading health promotion expert Steve Aldana, PhD, Director of Health Promotion Programs at Brigham Young University, will address:

- How health promotion and worksite wellness can generate significant healthcare cost savings
- Measuring the impact of absenteeism and lost productivity caused by unhealthy habits and lifestyle choices
- Where the cost savings come from and why some health promotion programs fail to deliver a positive ROI



Steve Aldana, PhD

*Director of Health Promotion Programs
College of Health & Human Performance
BRIGHAM YOUNG UNIVERSITY*



12:15 **Comprehensive Worksite Health Promotion Programs That Reduce Health Risks and Costs**

This session will examine a multi-year program implementation with outcomes measured for overall population impact. Program design parameters include integrated healthcare benefits, implementation supported by both health plans and employers at the worksite and using remote solutions, incentives for participation in programs, and risk reduction measurement using health assessment and claims. Worksite wellness approaches that optimize the use of incentives, provide meaningful programs for employees to participate in, integrate incentives that drive participation in both assessment and intervention programs, and surround those activities with strong communications and leadership support can provide quantified evidence of effectiveness. Session highlights include:

- How changes in health behaviors can generate a positive ROI
- Incentives and strategic communications to drive participation in health risk assessments
- How health assessment results strongly relate to healthcare costs
- Web-based and telephonic-based behavior change programs generate real results



Nico Pronk, PhD, MA, FACS

*Executive Director, HealthPartners Health Behavior Group
Vice President, Health and Disease Management
HEALTHPARTNERS*



1:00 *Networking Luncheon for Speakers and Delegates*

2:00 **Aligning Metrics and Health Management With Your Business Strategy**

Aligning health management metrics and strategy with the corporate business strategy is critical to demonstrating value to the business and maximizing business performance that is affected by poor health. Pioneer has developed a unique business model that proactively promotes a culture of integrated preventative health and wellness as a business strategy supporting four key market channels:

- Maximum employee engagement and capability
- Attraction/retention of a world-class workforce
- Quality, efficient and sustainable affordability of health care
- Safety goal of zero occupational injuries and illnesses

Recognizing that a number of factors drive these business objectives beyond preventative health and wellness, internal business partners have collaborated to establish a three-tiered metrics scorecard to evaluate impact. This integrated approach eliminates the “silo” approach and challenges in attempting to assess impact by a single intervention. This session will provide an examination of Pioneer’s approach to aligned metrics along with the opportunity to work through a sample scorecard for your own organization.

Jill Norris MPH, RN, CHES

Manager, Global Preventative Health & Wellness
PIONEER HI-BRED INTERNATIONAL, INC.
A DUPONT COMPANY

2:45 **The Vermont Worksite Wellness Project: A Collaborative Worksite Wellness Initiative Between BlueCross BlueShield of Vermont and UVM**

BlueCross BlueShield of Vermont and the University of Vermont are proud to collaborate on the Vermont Worksite Wellness Project, a 30-month (April 2005–September 2007) research study sponsored by the U.S. Centers for Disease Control and Prevention’s “Health Protection Research Initiative.” The Initiative supports a variety of workplace health promotion studies across the country. The project will compare the clinical and cost effectiveness of three distinct types of wellness programming in the workplace. The project will compare the relative effectiveness of three approaches to promoting healthy behaviors among employees: Tailored health services, the altered worksite setting and a combination of both. The project will measure both the financial and human capital impact of health promotion programs through employee outcomes that will measurement of BMI, waist circumference, blood pressure and (via finger stick) lipids and six-hour fasting glucose, as well as work-related injuries, absenteeism and productivity. Key discussion points for this session will include:

- Employer outcomes, including per-employee healthcare costs
- Measurement of BMI reduction (anticipated at an average of 10%)
- Measurement of employee productivity

Robert H. Ross, PhD

Principal Investigator
College of Nursing and Health Sciences
UNIVERSITY OF VERMONT



3:30 *Networking Refreshment Break*

4:00 **Positive Outcomes Generated by Onsite Health Promotion Efforts – A Case Study of Mutual of Omaha’s Wellness Program**

Mutual of Omaha Insurance understands the significant and avoidable costs associated with unhealthy lifestyle behaviors. We attempt to identify and reduce the prevalence of illness and conditions such as depression and other chronic disease by providing access to appropriate screenings, education and intervention. Currently, Mutual of Omaha touches more than 75% of their employees through health and wellness initiatives. Health promotion efforts are aligned with our strategic goal of creating an engaged workforce. This alignment has helped us make great strides toward providing a successful wellness program and has demonstrated a positive return on our investment. Key learning



points of this session will focus on:

- Measuring and evaluating our results
- Defining programming based on population needs
- Providing a menu of options

Chris L. Harter, MS
Wellness Program Manager
MUTUAL OF OMAHA



4:45 **Gaining Senior Management Support and Developing the Infrastructure Within Your Organization to Optimize Health Promotion and Well-Being Initiatives**

Intel is committed to promoting health and well-being to its employees as a way to achieve optimal health for employees. Meeting this goal helps improve quality of life, mental outlook and provides better control of health care costs. A dedicated staff has been working on this initiative since 2001. Intel’s dedication to health and well-being is evidenced by both its budgetary and staff commitment to the cause. Over the last two years, the health and productivity focus for Intel has increased dramatically to include other internal stakeholders who have aligned their roadmaps in a common strategic direction. During this session, you will learn more about the planning that took place which led to senior management support, including:

- How the infrastructure was built to achieve senior management support
- Resources and tools that were used to create employee interest in improving their health
- Results from the programs that have been offered to employees
- Insight into one company’s program that provides employees with enhanced health assessment, Health Risk Assessment and follow-up coaching

Patti Clavier, RN, BSN, COHN-S

Global Occupational Health
Health & Well-Being Operations
INTEL CORPORATION



5:30 *Close of Day One*

DAY TWO • WEDNESDAY, OCTOBER 25, 2006

7:30 *Continental Breakfast*

8:00 *Remarks from the Chairman*

8:15 **Health Outcomes From Two Successful Health Promotion Initiatives at Blue Cross Blue Shield of Massachusetts**

This session will examine the positive outcomes gained from two successful health promotion initiatives — one high touch program and the other a low touch program. The high touch telephonic lifestyle advising program engages members at risk for disease and works with them to improve or eliminate risk factors. Over the past several years, members have been triggered into the program via a personal health risk assessments. In 2006, members were identified through predictive modeling. Our FitBlue Go Walking program is a low touch program utilizing print, automated telephone messages, email and web-based programs to encourage members to walk, eat properly and lose weight. This presentation will share the outcomes from both programs and future directions based on those results. The presentation will focus on:

- Components of the telephonic Lifestyle Advising program, including how members are identified
- Risks improved and eliminated from the Lifestyle Advising program
- Components of the FitBlue Go Walking program
- Health outcomes from FitBlue Go Walking, including changes in BMI, exercise and nutrition



- Future direction for Lifestyle Advising and FitBlue Go Walking based on the successful outcomes already achieved

Janet Edmunson, MEd, FAWHP

Director of Prevention & Wellness

BLUE CROSS BLUE CROSS BLUE SHIELD OF MASSACHUSETTS

9:00 Quantifying the Value of Health Promotion and Worksite Wellness

Health promotion and worksite wellness programs can show true attainable costs savings. Microsoft will give an informative overview of several benefit programs they've implemented and share insights on the reasons behind the programs' successes. Key discussion points of this session will include translating improved health outcomes into quantifiable healthcare cost savings. The outcomes from these wellness programs have proven that wellness initiatives can be profitable.

Senior Leader (Speaker To Be Determined)

U.S. Benefits Division

MICROSOFT

9:45 *Networking Refreshment Break*

10:15 Critical Considerations in Developing and Implementing an On-Site Health Promotion Program for Employees

Early in 2006, Blue Cross and Blue Shield of North Carolina began evaluating steps to dramatically enhance its commitment to employee health lifestyles. Although the company already had an extensive repertoire of disease management, prevention, and wellness programs, senior management — including the CEO — felt that a more intensive set of interventions was desirable. A cross-functional team from Healthcare, Finance, Employee Health Services, Human Resources, and other areas developed a proposal to vigorously promote the healthy lifestyle concept using a variety of tools and incentives. Approaches ranged from changing menu selections in employee cafeterias to revamping on-site gym facilities and the initiation of health risk screenings (with monetary incentives) coupled with formal counseling sessions with the on-site nurse practitioner. This presentation will focus on the process that was followed to assess employees' needs, the potential barriers to implementation, and the ultimate structure of the program that evolved, including:

- Senior management's commitment to health promotion and onsite fitness facilities
- Overcoming economic hurdles and budgetary constraints
- Effective utilization of incentives and rewards to gain high participation levels for health promotion and weight management initiatives



J. Douglas Knoop, MD, MHA, FACS

Senior Medical Director

BLUE CROSS AND BLUE SHIELD OF NORTH CAROLINA



Jennifer Arcure

Senior Director/Team Leader Healthy Directions

PFIZER



11:45 Health Promotion, HIPAA and Inherent Legal Risks Employers and Health Plans Must Be Aware of Regarding Privacy Concerns and the Utilization of Health Rewards and Punitive Disincentives

Employers and health plans alike are both leveraging rewards programs and punitive disincentives to engage their employees in health promotion and worksite wellness programs. Employees are also voluntarily sharing with their employers (through health risk assessments) personal information regarding their health status. While the use of incentives and punitive disincentives may dramatically increase participation rates for health promotion programs, they also have the potential to place the employer or health plan at risk for violation of a number of Federal and state regulations centered on privacy issues. In this session Amy Gordon will shed light on how health plans and employers can successfully engage their employees in health promotion and worksite wellness programs and remain compliant with HIPAA and other regulatory measures. The session will also examine some of the potential risks that employers may face over the utilization of disincentives to penalize employees for having unhealthy behaviors or for failing to be eligible to receive health incentive rewards. Key discussion points will include:

- How to ensure that your health promotion program is HIPAA compliant
- How to provide incentives in a manner that is not legally prohibitive
- Understanding the risk of using punitive disincentives
- Privacy issues that employers must be aware of



Amy Gordon, ESQ

Partner

MCDERMOTT, WILL & EMERY LLP

McDermott Will & Emery

12:30 *Conclusion of Conference*

11:00 Creating a Culture of Health: Producing Measurably Better Health for Employees

Pfizer is committed to the long-term investment that's required to improve the health of their employees and family members. Towards this end, Pfizer provides a comprehensive health improvement program for its employees called Healthy Directions. The program focuses on health education and wellness, and takes the critical next step, by linking those key, up-front components with a rigorous one-on-one outreach program targeting the early diagnosis and timely treatment of those chronic conditions that underlie the nation's healthcare crisis. Through the utilization of a Health Questionnaire, 24-hour nurse line, confidential health resources web site and health improvement and management programs, Pfizer is confident that, over the long term, these health promotion initiatives will yield improved health outcomes, employee satisfaction, enhanced productivity and lower health care costs. Since the program's official launch on June 20, 2005, more than 13,000 Pfizer employees completed health screenings conducted at

Registration • 8:30 a.m.

Workshop A • 9:00 a.m. – 12:00 noon

An In-Depth Look at the Economic Evidence for Worksite Wellness: “Show Me the Money!”

How strong is the economic return evidence for worksite wellness? Examine the most recent results of a comprehensive meta-evaluation of economic return studies and learn how solid the scientific evidence for wellness has become. Characterize the strengths and weaknesses of the evidence in the peer review literature on the economic return from worksite wellness programs. Review what strategies make the most sense for presenting the validity of the business case or value proposition for worksite wellness. Learn what international trends are also appearing in the economic evidence.

Participants will focus on these learning objectives:

- Describe the process used to evaluate the quality of the research on the economic return of worksite wellness programming
- Identify the characteristics that define the more than 50 peer review articles that examine the economic return from worksite wellness efforts
- Summarize the main findings from more than 50 peer review studies on the economic return associated with worksite wellness programming
- Identify the major strategies for making a strong case for worksite wellness

ABOUT YOUR WORKSHOP LEADER:

Larry Chapman is the *Chairman and Co-Founder* of **SUMMEX HEALTH MANAGEMENT**, an Indianapolis-based firm that provides health and

productivity management services to employers, hospital systems, and managed care organizations. He has spent more than 25 years improving the health of employees, and their family members, and managing employee health costs. Formally educated in environmental health, medical technology, and medical care organization at UCLA and the University of Michigan, he has developed more than 600 employee health and productivity management programs including more than 100 wellness financial incentive programs. An internationally recognized expert and speaker on innovative health management interventions, he has also published 13 books and more than 180 professional articles and columns.

Workshop B • 1:00 p.m. – 4:00 p.m.

Gaining High Levels of Participation for Your Health Promotion and Wellness Programs to Drive Meaningful Change and Results

High levels of participation and organization wide acceptance of health promotion and worksite wellness programs are vital to ensuring that your program will deliver positive results. It's documented, and well known, that successful health promotion initiatives that do yield cost savings and quantifiable ROI, have also had very high levels of participation. The higher the participation level, the easier it is to demonstrate a genuine ROI for your health promotion programs.

During this in-depth and interactive workshop session, you will learn what it takes to gain organization-wide buy-in for health and wellness programs and subsequently demonstrate the ROI that your senior management is looking for.

The session will also provide solutions to successfully engage those members of your population who are unfit, unhealthy and who are resistant to giving up the unhealthy habits and lifestyle choices that put them at risk for a number of chronic and potentially life threatening conditions.

Key learning objectives of this session include:

- The effective utilization of incentives for engaging, unhealthy and “resistant” employees
- What you need to know to, not only gain senior management approval for health promotion, but also to genuinely convince them of the importance and value of fostering wellness in the workplace

ABOUT YOUR WORKSHOP LEADER:

Paul Couzelis, PhD, is the *President* of **MEDIFIT CORPORATION SERVICES, INC.** Paul has worked in the worksite health promotion and fitness field for more than 35 years in community and business settings. He served on the faculty of Columbia University and was the founder of the New York Cardiovascular Health Institute. As President of MediFit, he leads one of the largest employee health management provider organizations. In 2004, he was President of the National Coalition for Promoting Physical Activity (NCPA). Currently, Paul is part of a CDC team that is examining worksite obesity programs.

Special, In-Depth, Dinner Workshop • Tuesday, October 24, 2006

Workshop C • 6:00 p.m. – 9:00 p.m.

Quantifying the Health, Economic and Human Capital Impact of Health Improvement Initiatives

Health improvement initiatives have been of interest to employers and insurers for more than 30-years. However, most organizations have not fully committed to the implementation of health management initiatives because they could not quantify, or successfully measure, the value in a way that resonated with senior management. Of special interest is the economic gain in reduced healthcare cost, and improved worker productivity, produced by effective health management programming.

Participants will first examine how costs are incurred within an organization for people of differing levels of risk and with differing chronic disease profiles. Next differing methodologies for assessing the cost impact of health management initiatives will be explored. Finally, metrics that are gaining acceptance in the quantification of value will be presented. How these metrics are being translated and understood at the boardroom level will be addressed through case studies of mature health management programs. The results being experienced by best-practice programs will also be reported.

While still evolving, the process of quantifying the

value of health improvement initiatives is much more mature than even several years ago. Organizations that wish to demonstrate the value of health management programs now have at their disposal the tools and methodologies to carry out effective economic value analysis.

This workshop will help organizations committed to demonstrating the economic value of their programs to build the proper evaluation infrastructure, and to use it in a manner that generates accurate, believable and understandable information for senior management. You will learn:

- The economic impact of health improvement initiatives is now quantifiable, with the proper evaluation methodology
- Understanding economic impact requires knowing how the costs of poor health are generated, both through medical claims and reductions in worker productivity
- Selecting the proper evaluation methodology and metrics is crucial—good evaluation requires the building of data collection and analysis infrastructure, and buy-in to the methodology by senior management

- Significant learning can be achieved by viewing and understanding programs that have applied best-practice economic impact evaluation
- Organizations with the right vision, evaluation infrastructure, commitment to assessment, and agreement on the metrics, can effectively value their health management initiatives

ABOUT YOUR WORKSHOP LEADER:

John Harris, M.Ed., FAWHP, is *Principal* of **HARRIS HEALTHTRENDS, INC.**, a Toledo, Ohio-based company specializing in health management in the corporate and health insurance sectors. Mr. Harris has over 25 years of experience in the health management field, employed in both the corporate and private sectors. Mr. Harris is a Fellow in the Association for WorkSite Health Promotion, and served on its Board of Directors. He also serves on the board of directors of the Health Enhancement Research Organization (HERO), Health Promotion Advocates, and on the Advisory Board of the Institute for Health and Productivity Management. Mr. Harris has also served as a section editor for the journal *WorkSite Health*, and is a columnist in the *Health Promotion Practitioner*.

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ACHIEVING ROI for WELLNESS

Measuring and Quantifying the Value of Health Promotion and Worksite Wellness

October 23-25, 2006 • Hilton San Diego Resort • San Diego, CA



WRG Research, Inc.
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	Health Plans and Employers		Commercial Rate	
	Early Bird Rate Before Sept. 8, 2006	Regular Rate After Sept. 8, 2006	Early Bird Rate Before Sept. 8, 2006	Regular Rate After Sept. 8, 2006
Conference ONLY	\$1095	\$1395	\$1395	\$1695
Conference and 1 workshop	\$1395	\$1695	\$1695	\$1995
Conference and 2 workshops	\$1695	\$1995	\$1995	\$2295
Conference and 3 workshops	\$1995	\$2295	\$2295	\$2595

Fee includes continental breakfast, lunch, refreshments, and conference documentation CD-ROM. Please make checks payable to WRG Research, Inc.

TEAM DISCOUNT: Register 3 team members from the same organization at the same time and the 4th team member attends **FREE!** (Valid only at regular registration rate.)

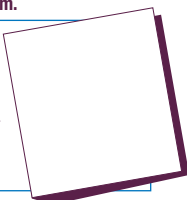
PAYMENT POLICY / SUBSTITUTIONS / CANCELLATIONS: Registration fees must be paid by October 9, 2006. Your registration may be transferred to a member of your organization up to 24 hours in advance of the conference. All cancellations received on or before October 9, 2006 will be subject to a \$195 administrative charge. We regret that no refund for cancellations will be made after this date. In case of conference cancellation, World Research Group's liability is limited to refund of the conference registration fee only. World Research Group reserves the right to alter this program without prior notice. All cancellations must be submitted in writing on or before 14 days prior to the conference date in order to receive a refund, minus cancellation fee.

CONFERENCE VENUE:
Hilton San Diego Resort
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DOCUMENTATION CD-ROMS: If you are unable to attend the conference or you would like extra copies for your colleagues, you can order your conference documentation CD-ROM today. Don't miss out on the valuable information presented by industry leaders exclusively at this event. The CD-ROM is available for only \$150. Add \$50 for international shipments. The CD-ROM includes overheads, articles and presentations. Simply fill out the order form and the CD-ROM will be shipped to you 2 weeks after the conference occurs.



Registration Card

Please photocopy this form for multiple registrations.

Yes! Please register me for ACHIEVING ROI FOR WELLNESS.

Also register me for: Workshop A Workshop B Workshop C

I would like to take advantage of the early-bird discount by registering before September 8, 2006.

I cannot attend. Please send me a Conference Documentation CD-ROM. Please send me future information via e-mail

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