



CASE STUDY

One Company's Journey To A Holistic Wellness Strategy Away From Outcomes-Based Programming

by David Evans and Associates, Inc.

★ With any major strategic change comes exciting wins, and unexpected challenges. The good news is we can rely on pioneers of these changes to share insight to help us navigate this newly charted territory. In this resource, you'll find a list of challenges and wins experienced by David Evans and Associates, Inc. during their journey of moving away from an outcomes-based wellness program. They embarked on this journey in late 2019. These insights are a reflection on the two and a half years since their decision to work toward improving the way they do wellness.



CHALLENGES: Some of these challenges were obvious and others required the organization to respond as these dynamics revealed themselves.

- 1. Not Everyone Appreciates Change:** Not surprisingly, there were employees who used the existing wellness platform and enjoyed the rewards they received. These employees didn't want to lose the benefit of premium discounts or deal with the challenge that change brings. The organization responded to this by ensuring robust communication related to the reason for the change and the new benefits to come.
- 2. Adjusting for Attitudes and Beliefs:** Like most organizations, the leaders had been taught that the existing outcomes-based model was the best way to deliver employee well-being. Moving away from the biometric screening/HRA approach was a leap of faith. The organization was aware that just like its leaders had been trained this was the best approach, they had also communicated the value of this model to their employees. There was an awareness that the mental model had to shift for leadership, as well as for the employees.
- 3. Resourcing Time and Talent:** The existing program was baked into the insurance benefits platform. It required little administration from the internal team. Creating a program internally vs. using a pre-designed set of software tools was/is an ongoing adjustment to the resource allocation of time and talent.

- 4. Becoming Workforce Wellness Experts:** As the development of the wellness strategy shifted to the internal team, the team had to become the wellness leaders. Learning to read and trust the data we collected on our employees' needs and turn that into decisive action was an adjustment. As with all things, some of what we offered was highly successful, others not so much. Wellness is an iterative approach. The organization learns from each experience and keeps going.



WINS: Some of these wins we had hoped for, and others came as a welcome surprise.

- 1. Breadth and Depth:** The organization has heard employees' stories about how the program has significantly impacted them come with examples from each of the pillars of health. The program has been well received because it is more holistic than any other previous version. This is a survey response from one participant: "I found the Wellbeing Program highly valuable. It inspired me to set a step goal, track daily, and join step competitions. It inspired me to research volunteering options with my family, volunteer time, and write a speech about volunteering for Toastmasters. It also inspired me to take a time management class on LinkedIn Learning. I used my LSA to purchase a year of Calm. I really enjoyed the team exercise component." Another said "I thought that this was a really great program and it's awesome that DEA supports employee's physical and mental wellbeing. It's really important for employees to know that they mean more than just the work they do, and DEA is great at supporting that."
- 2. Inclusion:** One of the primary drivers to move away from the previously existing model was that it was only for employees on the health insurance plan. The new model allows the organization to care for the well-being of all employees.
- 3. Expansion:** The new strategy has increased participation. The organization is experiencing broader and more enthusiastic participation than in the last few years of the previous program. During the last year of our old program (2019), we had about 25% participation. In 2021 we had 62% participation and in 2022% we're already at 64% participation. Since the new Wellbeing Program has much smaller financial rewards than the prior program, we believe this jump in participation is significant.

4. **Engagement:** Employees express appreciation for elements of the program they like most, like the team challenges. They ask for more ways for the business to facilitate group activities and help them come together with their teams in more and new ways. Their request for more and their voluntary input is not something the organization could have experienced with an outsourced model. When employees suggest improvement and expansion and the company can act on that, there is increased trust in the belief that the leaders are truly invested in employee well-being. Employees can see that no one is being performative toward employee wellness.
5. **Holistic:** When the previous wellness offering was outsourced, wellness was siloed to that one platform. The new model allows the company to recognize a multitude of programs that support employee well-being, many of which were already in place. We reorganized our Well-being Plan intranet site to list the resources already in existence, along with added resources under the appropriate Pillar of Health. The multitude of programs and resources offered through various vendors and insurance products were pulled together to create a comprehensive model that is easily accessible.

★ **Conclusion:** Once an organization identifies the way their current wellness model is not effectively serving their goals, the next and natural thoughts are often of what could go wrong while moving to something new. Stay focused on the goals you want to meet in your new strategy and problem solve for challenges that come up. Challenges are not a reason to keep things the same. Rather, they are simply something to manage and resolve. Every time you pro-actively respond to and effectively make your way through challenges, your leadership better serves employees.

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