

**Organization Name:** \_\_\_\_\_

**Date Completed:** \_\_\_\_\_

**Organization Representative Completing Form:** \_\_\_\_\_

*(Note: It's highly recommended the individual completing this form discuss it with the organization's management to ensure goals are similar and endorsed)*

---

## 2008 Pre-Request for Proposal (RFP) Organization Wellness Evaluation

*(The purpose of this evaluation is to identify the type of Wellness Program your Organization desires and assist Denman in identifying the vendor partners that would best meet those needs)*

1. Has a recurring annual Wellness Budget been determined in the Organization's benefits budget? What is the dollar amount that will be allocated towards the 2008 Wellness Program (to include program services and incentives)? Budget intentions for 2009 and beyond?
2. While a Wellness Program's Return on investment (ROI) can sometimes be difficult to clearly measure, typically an organization will begin to see more significant ROI between years three (3) to ten (10). Which of the areas listed below is the Organization most trying to achieve by offering a wellness program? Rank from 1 – Most Important to 10 – Least Important.
  - \_\_\_ A good will gesture by the Organization
  - \_\_\_ Maintain or enhance the Organization's morale
  - \_\_\_ Attract healthier future employees
  - \_\_\_ Deter unhealthy employees from applying for employment
  - \_\_\_ Create a culture of wellness expected of all employees, led by management
  - \_\_\_ Achieve higher productivity
  - \_\_\_ Reduce safety risks in the workplace
  - \_\_\_ Slow the rate of increase in healthcare costs (fewer, lower cost in claims)
  - \_\_\_ Assist employees to have happier and healthier lives
  - \_\_\_ Other (Please list): \_\_\_\_\_
3. Assuming the Wellness Program desired is "Intensive" (includes the following components: written Health Risk Appraisal (HRA) and Biometric Blood Screening and ongoing education throughout the year), what time of the year would be best to launch the Wellness Program and why?
4. The Organization may have various work schedules and locations, therefore what is the number of anticipated locations that the Organization would want to hold wellness biometric blood screenings? Note: Typically, for employers with 150-300 employees, fees proposed by various wellness vendors assume two (2) hour sessions at three (3) to five (5) site locations; additional sites/hours likely would incur additional charges.

5. A successful Wellness Program requires full management support and advocacy. Do you feel that your Management Team would support an "Intensive" wellness program and if so, would they be willing to promote the program to their individual departments?
  
6. Not only is Management support and buy in important, but employee buy in is just as important. Do you think that the Organization would have volunteers that would be willing to become Wellness Cheerleaders and assist Human Resources in coordinating and promoting the Wellness Program?
  
7. For a variety of reasons, employees can be a bit hesitant to participate in an Organization's wellness program. Therefore, successful Wellness Programs offer incentives to encourage employee participation and reward them for their healthy habits. Which of the following incentives would the Organization prefer, are viable, and you strongly feel would motivate employees? Rank in order of preference of the top 5 (1-most desirable, 5 – least desirable)

- Organization logo Apparel (t-shirt, sweatshirt, hats)
- Workout gear with or without Organization logo (water bottle, towel or gym bag)
- Visa gift cards
- Fitness or relaxation audio/video tapes or DVD's
- Movie tickets
- Reduction in health insurance premiums for participating. Dollar Value Considering: \$\_\_\_\_\_/mo.
- Gift certificates to area merchants
- Recognition via Organization's newsletter, department meetings, certificates, etc.
- Trophies, plaques or medals
- Books or magazine subscriptions (fitness, cooking, health, etc.)
- Massage
- Day off from work
- Preferred Parking Spot for a week or month
- Other incentives (please specify) \_\_\_\_\_

8. What are the Organization's Wellness Program participation expectations (percentage of eligible)?
  - a. Will the Wellness Program be open to all employees (enrolled and non-enrolled, seasonal, etc.), only employees enrolled in the Organization's medical plan (or employees and spouses)? Please explain.
  
9. Confidentiality within a Wellness Program is paramount to the Organization, employees and wellness vendors. The latter of which require participants to complete and sign consent forms to be in compliance with Federal HIPAA Privacy laws (similar to that which is required by all physician offices prior to a patient being seen for services) and necessary vendor requirements prior to taking an HRA and participating in a biometric blood screening. Is the Organization willing to support this requirement (content of such confidentiality/consent forms to be approved by Organization of course)? If not, is the Organization comfortable offering an education only Wellness Program (No Health Risk Assessment or Biometric Blood Screening)?
  
10. Other Comments/Program Desires/Unique Considerations to be aware of?
  
11. Based on the responses above, as you discussed this with the organization's CEO and CFO or those in similar management roles, do they agree with these goals and objectives?
  - a. CEO: Yes \_\_\_\_\_ No \_\_\_\_\_, If no, why?
  - b. CFO: Yes \_\_\_\_\_ No \_\_\_\_\_, If no, why?
  - c. Are there any obstacles that you're aware of to move forward?