

Participating in the CDC's National Healthy Worksite Program

Diana Sarkine, who serves as the controller and firm administrator at H.J. Umbaugh & Associates, wanted her company to do more to promote health among its staff. Employees at Umbaugh work in a high-stress environment, where they travel frequently and work long hours. Sarkine applied to the Centers for Disease Control and Prevention's (CDC's) National Healthy Worksite Program (NHWP) with the hope of finding the resources and guidance to put together a tailored wellness program. She envisioned developing a program that

Umbaugh applied principles of implementing a comprehensive workplace health promotion program learned during the NHWP by putting in place a combination of programs, policies, and environmental supports to address multiple areas of employee health.

would support a culture of learning and work-life balance and one that could attract and retain high-quality staff.

Sarkine learned about the NHWP through her company's insurance broker, Hylant Group, Inc. When Umbaugh started the NHWP, it had a few health promotion initiatives in place, but no formal worksite wellness program. The company had a tobacco-free campus

policy, offered a few seminars on various health-related behaviors, and distributed some health promotion marketing materials through internal communication channels. However, these efforts were not tied together as part of an ongoing, comprehensive program.

As the primary champion of workplace wellness at Umbaugh, Sarkine had to convince senior leadership that participating in the NHWP could benefit both the company and its employees. Company executives were somewhat resistant at first, largely because they were focused on Umbaugh's core work and did not immediately see how wellness initiatives would fit into the company's high-pressure culture. Sarkine also had her own concerns. She wondered if enough people would be interested and have time to participate, given that many employees have limited flexibility in their schedules. She was also concerned about the program's ability to keep employee data

Organization Background

H.J. Umbaugh & Associates, Certified Public Accountants, LLP

- « Established in 1950
- « Industry: Finance, insurance, and real estate
- « Location: Based in Indianapolis, Indiana, with three other locations in the Midwest
- « 151 Employees

H.J. Umbaugh & Associates, Certified Public Accountants, is one of the largest independent financial advisors to government agencies in the Midwest, with expertise in all areas of public finance. Established in 1950, Umbaugh provides timely, independent, meaningful, and actionable financial guidance for cities, towns, townships, counties, utilities, schools, libraries, hospitals, and airports. Umbaugh helps community leaders resolve the financial issues they face as they work to improve quality of life in their communities.

confidential. Despite these concerns, Sarkine was eventually able to get buy-in from senior leadership and move forward. In retrospect, she said the delay in getting approval might have helped because it forced executives to really think about the company, its employees, and the direction they wanted the program to take.

Sarkine started by forming a wellness committee. She followed best practices by recruiting staff from different levels of the company (e.g., senior leadership, middle management, entry-level staff). Although Sarkine said she is a very hands-on person, she empowered the committee by delegating certain activities. The committee used the marketing and engagement strategies promoted in the NHWP training to brand its health promotion program with the slogan "Health Matters@Umbaugh." To raise employee awareness and interest in the program, the committee held a kick-off event and gave out T-shirts with the program's logo.



*Umbaugh headquarters in Indianapolis.
Photo provided by Umbaugh.*

One of the first NHWP activities Umbaugh completed was a baseline health assessment in 2013. The NHWP assessments included employee health surveys covering health conditions, healthy behaviors, and perceptions about the work environment, as well as biometric screenings. Like all of the employers participating in the NHWP, Umbaugh also completed the [CDC Worksite Health ScoreCard](#), a validated organizational tool designed to help employers assess the extent to which they have implemented evidence-based health promotion interventions.

Sarkine participated in most of the NHWP trainings and webinars that addressed the main developmental stages for a wellness program, which are assessment, planning, implementation, and evaluation. She attended monthly meetings with other local NHWP employers that were led by Hylant. These meetings gave employers a chance to share their strategies for overcoming common challenges and to encourage and support each other. Umbaugh's wellness committee met regularly, and Sarkine had monthly technical assistance calls with CDC staff to share updates and get advice and information about resources.

Setting Meaningful Goals

After receiving the results of the 2013 baseline assessments, Umbaugh decided to focus on improving physical activity and set the following objectives to meet this goal:

- Reduce the number of employees who are physically inactive.
- Reduce the number of employees who are categorized as obese or overweight.

Using a program planning tool from the NHWP, Umbaugh developed a detailed plan to meet these objectives through multiple intervention strategies. For each strategy, the plan specified the following:

- How and when the strategy would be implemented (including who was responsible for each action).
- How the committee would communicate to employees.
- How the committee would evaluate whether the strategy was implemented and how effective it was (e.g., level of participation, employee satisfaction).

Program Overview

Increasing Physical Activity

Just before starting the NHWP, Umbaugh had set up a physical activity challenge that awarded cash prizes to employees who completed the most minutes of physical activity. To maintain momentum, the

wellness committee bought the [WELCOA Health Trip](#) for \$239. This easy-to-use, week-by-week program is designed to teach employees about various aspects of staying healthy, particularly how to increase their physical activity.

Over 8 weeks, employees “traveled” to various destination cities by recording their weekly aerobic activities. To be eligible for prizes, employees had to engage in at least 150 minutes of activity each week. They received a “mover mile” for each minute of activity, and those with the most miles each week won. For each destination city, employees were encouraged to earn additional points by completing a weekly challenge, such as eating more whole grains or getting 7 or more hours of sleep a night.

Some prizes were based on themes linked to a specific destination city. For example, a Florida destination was linked to a healthy sleep challenge, and the prize was a palm tree pencil and a sleep mask. Fifty-one percent of the Indianapolis office staff participated, traveling a total of 499 mover miles.

In addition to these organized activities, Umbaugh paid for employee memberships at a local gym. About 30 employees used the gym during the first several months of Umbaugh’s participation in the NHWP. The wellness committee also arranged for bike racks to be installed to encourage biking to work.

Healthy Eating and Weight Management

Starting in December 2014, Umbaugh set up a “maintain, don’t gain” initiative focused on nutrition and weight management. The company encouraged employees to maintain a healthy weight during traditional holiday periods when people tend to eat more and to engage in physical activity during colder months when people tend to exercise less. As part of the initiative, the wellness committee encouraged employees to participate in regular weigh-ins. One on-site weigh-in was held at the beginning of the initiative, followed by weekly weigh-ins that employees did on their own.

Employees also received weekly “Motivation Monday” e-mails to help them start each week with wellness in mind. At the end of the week, they received “Way to the Weekend” e-mails with tips on healthy meals and activities to keep them going during the weekend.

Program Success

After it finished the NHWP in 2015, Umbaugh completed the CDC Worksite Health ScoreCard again as part of its follow-up assessment. The company

The committee tailored its strategies to meet the needs of Umbaugh employees. For example, the company does not have an on-site cafeteria and has limited control over the items in its vending machines. To overcome this problem, the company bought insulated lunch bags to encourage employees to bring a healthy lunch from home. This initiative was directed particularly at employees who spend most of their days traveling to client sites, to help them plan healthy meals and snacks while on the road. To help staff in the Indianapolis office enjoy lunch outside and possibly add physical activity to their lunch breaks, the wellness committee worked with the building owner to place picnic tables near the building.

Improving Overall Health and Wellness

To help employees improve their overall health, Umbaugh encouraged them to complete several wellness activities, including the Umbaugh Wellness Employee Scorecard Challenge. This challenge offered employees the opportunity to complete activities and earn points for prizes. These activities were divided into three categories:

- Health Screenings and Clinical Services.
- Wellness at Work.
- Active and Healthy Lifestyle.

Examples of activities included getting a dental or eye exam, taking the stairs instead of an elevator, standing up while talking on the phone, joining a gym, eating 5 servings of fruits and vegetables a day, or donating blood.

When participants had earned 500 points, they were entered into a drawing for a prize. Each additional 50 points earned another entry into the drawing. The more activities completed, the more points and entries a participant earned, which increased the odds of winning. One grand prize of \$500 and three additional prizes of \$100 were awarded. The challenge ran from August 2013 through December 2013 and was open to all employees at all locations.

increased its total ScoreCard score from 63 to 134 out of a possible 264 points. The company made improvements in several areas, including its use of

evidence-based interventions and its goal area of physical activity.

Some examples of the evidence-based strategies that Umbaugh received points for on its 2015 ScoreCard that it did not have in place in 2013 included the following:

- Subsidizing or discounting the cost of on-site and off-site exercise facilities.
- Providing environmental supports for recreation or exercise, such as trails or tracks for walking or jogging, maps of suitable walking routes, and racks for bicycles.
- Providing free or subsidized body composition measurement, such as height and weight, body mass index (BMI) scores, or other body fat assessments (beyond self-report), followed by directed feedback or clinical referral when appropriate.

Umbaugh also reported a large increase in its score for the Organizational Supports module, which assesses the extent to which organizations have a foundation and infrastructure in place to support and maintain a workplace health promotion program. It now has a health promotion coordinator and committee, uses competitions to support employees' behavior changes, has an annual health promotion budget, sets annual organizational objectives for health promotion, and has leadership and management support.

CDC Worksite Health ScoreCard Overall Score in Wellness Programming, 2013-2015



The assessment data related to the issues that Umbaugh focused on are summarized in the following tables:

2013 Employee Health Issues and Lifestyle Risks Profile (Employees = 38)	
Self-Reported Health Assessment Survey	
Eat at least 5 daily servings of fruits and vegetables	3%
Engage in little or no physical activity	26%
Current smoker	8%
Biometric Screening	
Overweight (Body mass index 25.0-29.9)	45%
Obese (Body mass index ≥ 30)	29%
Waist circumference (>35 for women, >40 for men)	42%

2015 Employee Health Issues and Lifestyle Risks Profile (Employees = 39)*	
Self-Reported Health Assessment Survey	
Eat at least 5 daily servings of fruits and vegetables	8%
Engage in little or no physical activity	33%
Current smoker	3%
Biometric Screening	
Overweight (Body mass index 25.0-29.9)	39%
Obese (Body mass index ≥ 30)	23%
Waist circumference (>35 for women, >40 for men)	39%
<i>*Percentages include all employees who provided data in 2015, including those who did not complete the 2013 assessments.</i>	

Eighty-nine percent who participated in the 2015 assessment said they supported the environmental changes that created a safer and healthier culture at Umbaugh, and 84% supported changes in policies as a result of Umbaugh's health promotion program. All employees agreed that they were well-informed about health and wellness opportunities at Umbaugh.

Challenges

One of Umbaugh's challenges was that new leadership, including a new executive partner, was put in place during the first few months of the company's participation in NHWP. Using techniques she learned in the NHWP training, Sarkine met with the new leaders to present the baseline assessment results and discuss the objectives of the wellness program to convey its potential benefit to the organization. This approach helped her build leadership support and organizational commitment to the program.

Another challenge for Sarkine was maintaining a high level of engagement by the wellness committee. Initially, employees volunteered to serve, enthusiastically accepted the responsibility, and set out to have a positive effect on their colleagues' health and well-being. Over time, participation waned among some committee members. During one of Sarkine's monthly technical assistance calls, the

CDC subject matter expert suggested that Umbaugh design a "wellness retreat" to refocus, reenergize, and spark interest in the program again. The retreat also provided an opportunity to recruit new members to the committee and bring in fresh perspectives. In addition to the retreat, Sarkine drafted and posted a statement on the company's intranet site to provide clear expectations and responsibilities for future wellness committee volunteers.

Like other organizations, Umbaugh has its busy seasons, when deadlines are looming and workloads are heavy. During these periods, participation in wellness activities usually declines significantly. Rather than trying to maintain program activities and compete for time when employees are focused on other priorities, Sarkine has found it more effective to scale back on activities during the busier seasons and provide more programs when staff schedules are less hectic.

What's Next?

Sarkine is committed to Umbaugh's health promotion program and its long-term success, and she is motivated to build internal capacity and knowledge so that the program can be sustained when she retires. She plans to recruit newer, younger employees to the wellness committee. Because Umbaugh is partially self-insured, Sarkine sees the medical claims that come in and is aware of the economic effect of poor health for employees and the overall company. She is focused on building a sustainable program infrastructure and process, as well as mentoring others to become leaders in the program.



The National Healthy Worksite Program was designed to help employers put into action science- and practice-based disease-prevention and wellness strategies that would lead to specific measurable health outcomes to reduce chronic disease rates. From 2013-2015, each participant received support, training, and technical assistance to put in place a combination of program, policy and environmental interventions to support physical activity, good nutrition and tobacco-use cessation.