

THE WELLNESS COUNCIL OF AMERICA PRESENTS

A WELCOA  
**Case Study**



## ABOUT **DAVID HUNNICUTT** PhD

**Dr. David Hunnicutt** is the President of the Wellness Council of America. As a leader in the field of health promotion, his vision has led to the creation of numerous publications designed to link health promotion objectives to business outcomes. Known for his ability to make complex issues

easier to understand, David has a proven track record of publishing health and wellness material that helps employees lead healthier lifestyles. David travels extensively advocating better health practices and radically different thinking in organizations of all kinds.

## ABOUT **TIM O'NEIL** MBA

**Tim O'Neil** is the Manager of Employee Health & Financial Wellness, guiding the company-wide employee health and financial wellness initiative for Meredith Corporation. Among other duties, O'Neil provides health and financial wellness educational programming and leads wellness teams across all locations, implements an annual health and financial wellness assessment, manages incentives and program design,

collaborates with additional wellness program providers, and leads the integration of Meredith's onsite Health/Medical clinic into the corporate wellness strategy. With the success and recognition of Meredith's wellness program in the national media, O'Neil has become a nationally recognized champion for worksite wellness.

## ABOUT **MADELINE JAHN** MOL

**Madeline Jahn** is the Director of Communications for the Wellness Council of America. Her role is to coordinate the development of new publications and pool existing resources for WELCOA members, serving the mission of health promotion through editing and planning support. She has a Master's

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## ABOUT **BRITTANY STOHL**

**Brittany Stohl** is the Graphic Designer for the Wellness Council of America. She has a Bachelor's of Fine Arts Degree from the University of Nebraska - Lincoln, and is in the process of obtaining a Holistic Health Coach Certification through the In-

stitute for Integrative Nutrition. She brings a fresh perspective to WELCOA's line of publications and lends creative energy to advancing WELCOA's mission on a national playing field.

## ABOUT **WELCOA**

**Wellness Council of America (WELCOA)** was established as a national not-for-profit organization in the mid 1980s through the efforts of a number of forward-thinking business and health leaders. Drawing on the vision originally set forth by William Kizer, Sr., Chairman Emeritus of Central States Indemnity, and WELCOA founding Directors that included Dr. Louis Sullivan, former Secretary of Health and Human Services, and Warren Buffet, Chairman of Berkshire Hathaway, WELCOA has helped influence the face of workplace wellness in the U.S.

Today, WELCOA has become one of the most respected resources for workplace wellness in America. With a membership in excess of 5,000 organizations, WELCOA is dedicated to improving the health and well-being of all working Americans. Located in America's heartland, WELCOA makes its national headquarters in one of America's healthiest business communities—Omaha, NE.



# A WELCOA Case Study

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## PROOF IS IN THE NUMBERS

Perhaps the most compelling thing about the Meredith Wellness program is the great data analysis it has done, which is a significant reason why the program was able to achieve WELCOA's Platinum-level Well Workplace Award.

Since 2008, the award-winning wellness initiative at Meredith has received national recognition from the U.S. Surgeon General, UnitedHealthcare, League of American Bicyclists and the American Heart Association. Meredith's program has also been featured online and in *The New York Post*, *Forbes Magazine*, *Fortune Magazine*, *HR Magazine* and in numerous special interest publications.

## The Story Of Meredith Corporation

### A People-Minded, Platinum Well Workplace

*Meredith (www.meredith.com) is one of the nation's leading media and marketing companies with businesses in magazine and book publishing, television broadcasting, integrated marketing and interactive media. Its leading brands include Better Homes and Gardens, Family Circle and Parents magazines, among many others, and the company employs approximately 3,000 employees operating in 21 locations.*

*In 2011, Meredith won WELCOA's Platinum Well Workplace Award for its results-oriented wellness program. As one of America's Healthiest Companies, Meredith has agreed to share its success story with the WELCOA Nation, which you'll read in the following pages of this case study.*

### About Meredith Corporation

Headquartered in Des Moines, Iowa, Meredith's main location has nearly 1,000 employees, with the second-largest location in New York City housing 700 employees. Meredith also owns 12 television stations across the country, including properties in top-25 markets such as Atlanta, Phoenix, Las Vegas, Nashville and Portland, among others. In addition, Meredith has an extensive Internet presence that includes four networks made up of 23 web sites and strategic alliances with leading Internet destinations. The company also operates marketing agencies and/or publishing sales offices in Detroit, Los Angeles, San Francisco, Dallas, Washington, D.C. and Chicago, among others.

The Meredith National Media Group features 22 subscription magazines—including *Better Homes and Gardens*, *Family Circle*, *Ladies' Home Journal*, *MORE*, *Parents*, *Fitness* and *American Baby*—and hundreds of special interest publications and books. Meredith is the industry leader in creating content for key consumer interest areas such as home, family, health and wellness, and self development. The company owns one of the largest domestic databases, enabling its media advertisers to precisely target marketing campaigns.

At the core of its accomplishments is Meredith's commitment to its brands and customers. For more than 100 years, Meredith brands have been providing women with information and inspiration to create a rich and meaningful life. By focusing on the core passions of home, family, health and wellness, and self development, the company continues to play a significant role in the lives of 80 million women. By delivering quality, trusted content whenever, wherever and however its customers want it, Meredith has evolved into the leading media and marketing company focused on women.

Through the Meredith wellness program and by providing its employees with the tools and resources to live a healthy life, Meredith embodies the core values represented by its brands.

### Building A Legacy

When Steve Lacy became Meredith's CEO in 2006, the company's health care costs had seen an 18.5% increase from 2004-2006. Lacy wanted wellness to be part of his legacy and he needed to combat the rising health care costs, so he decided to pilot a wellness program at the Des Moines headquarters.

In the fall of 2006, Meredith conducted a wellness screening, received the aggregate screening results, formed an employee wellness committee, and started to lay the foundation for targeted interventions based on areas of the company's greatest health risks. In 2007, Meredith hired a Wellness Manager to oversee the program and expanded it companywide to all 21 locations.

### Growing By Leaps & Bounds

The Meredith wellness program started small, offering a few initiatives focused on physical activity, healthy eating and controlling stress. Since 2006 the program has grown, establishing stronger connections to employee benefits, the overall company strategy, and even radiating to employees' family members.

In the following pages, you'll read how Meredith has fully integrated its program into the company culture, and has had success in tying its wellness initiatives to corporate financial goals. Not only is the Meredith wellness program a tremendous source of support and encouragement for its employees, but it is also expanding as a platform for use by other companies.

“This award acknowledges our commitment to improving employee health and quality of life. It's extremely gratifying to see Wellness Director Tim O'Neil and our employee wellness committees receive this recognition.”

### Winning WELCOA's Platinum Well Workplace Award

Every year, the Wellness Council of America conducts an innovative initiative recognizing quality and excellence in worksite health promotion: The Well Workplace Awards. A “Well Workplace” is an organization fully embracing its responsibility for maximizing the health and well-being of its employees, in which it is evident that worksite wellness has become part of the overall business strategy.

**Become a WELCOA  
member today!**

[www.welcoa.org](http://www.welcoa.org)

Driven by a rigorous, pre-defined set of worksite wellness criteria, organizations of all kinds compete to be recognized as one of America's Healthiest Companies, but only a handful reach an exemplary level. To be sure, as a Platinum Well Workplace Award-winning organization, Meredith has earned the highest recognition for its worksite wellness programming. In the following case study, you'll get an insider's look at why Meredith's wellness program is the epitome of WELCOA's results-based wellness model.

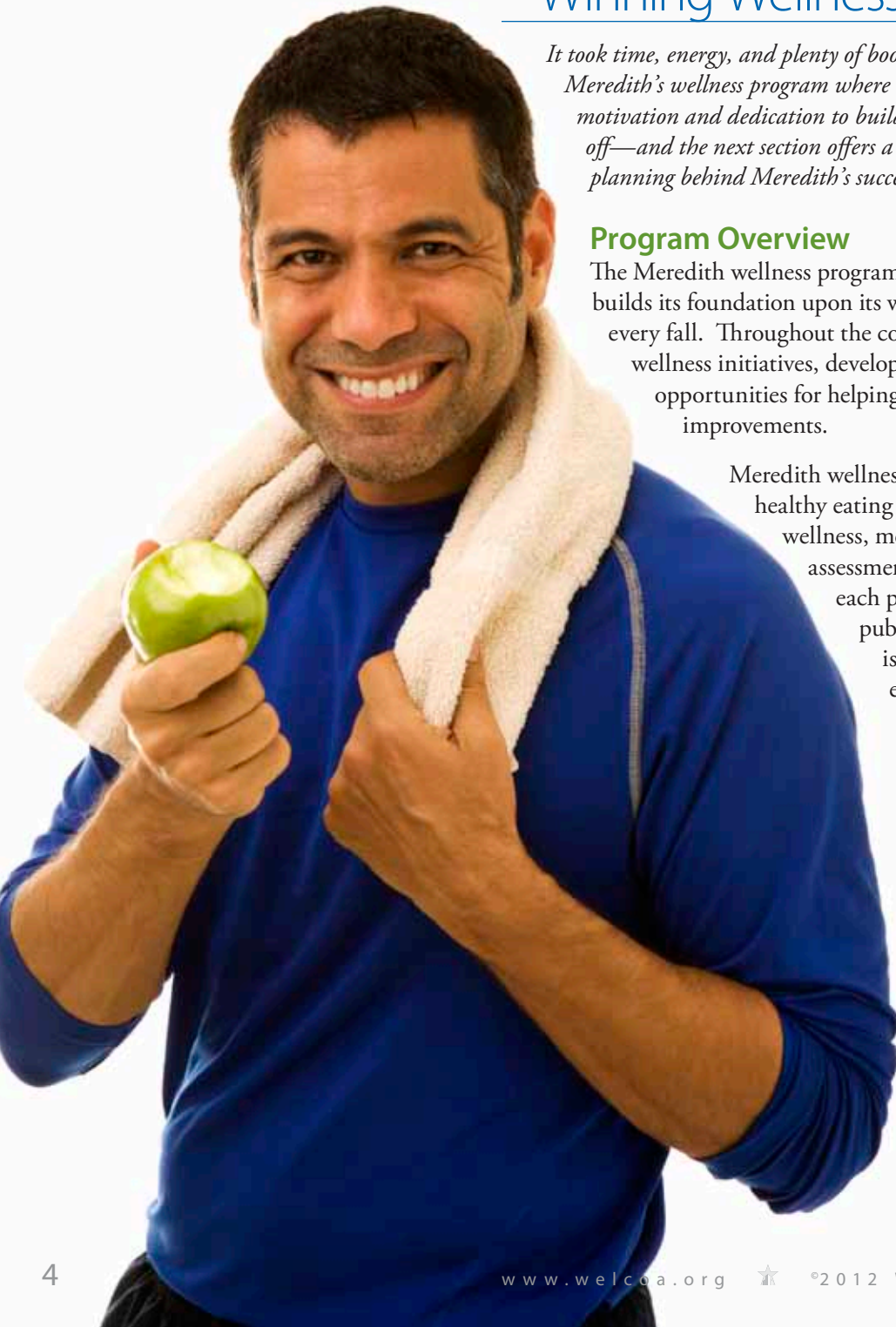
## I. Designing A Platinum Award Winning Wellness Program

*It took time, energy, and plenty of boots-on-the-ground research to get Meredith's wellness program where it is today. However, Meredith's motivation and dedication to building a results-oriented program have paid off—and the next section offers a behind-the-scenes look at the vision and planning behind Meredith's success.*

### Program Overview

The Meredith wellness program operates on a 12-month cycle and builds its foundation upon its wellness screening, which is conducted every fall. Throughout the course of the year, Meredith offers robust wellness initiatives, developed and structured specifically around opportunities for helping employees make significant health improvements.

Meredith wellness initiatives target physical activity, healthy eating habits, tobacco cessation, financial wellness, medical self-care and health risk assessment, and you'll see a detailed overview of each program in the sidebars throughout this publication. The overall length of initiatives is important to maintaining employee engagement because campaigns are long enough to make a sustainable change, but not so long that participants lose interest halfway through the program. The Meredith wellness team finds that a 4-8 week program length is ideal—and is best combined with a few shorter or one-time initiatives added throughout the year.



## Senior Leadership & Support

One prominent reason for Meredith's success in wellness programming is a culture of wellness that stems from the very top level. Wellness is embedded into the strategic vision, and its importance is communicated throughout the company by Meredith Chairman and CEO Steve Lacy. The senior leadership team not only supports the program verbally, but also demonstrates the importance of wellness by practicing and participating on a regular basis. For example, the CEO and all of his direct reports each earned 1,000 Wellness Points last year. (See page 7 for details on the Wellness Points program.)

The Meredith wellness vision statement is designed to help employees understand their role in the company's wellness initiative. Meredith's overriding goal is to develop a healthier and more productive workforce through a comprehensive health and wellness strategy. Moreover, company leadership values the Meredith wellness program because it allows employees to live longer, happier lives, leading to an enjoyable retirement.

The leadership team responsible for planning wellness has set the bar high with a "Strive for 85" motto. This is a goal for the Meredith wellness program to achieve an 85% participation rate in the health risk appraisal and wellness screening, and to have 85% of screening participants fall into the low-risk category by having two or fewer risk factors. The team is currently at 92% employee participation in the health risk appraisal and wellness screening—and 87% of the participants are in the low-risk category.

## WHAT MEREDITH EMPLOYEES ARE SAYING...

“My entire body changed doing [the Meredith Wellness challenge] because those I work with kept me motivated! I am truly happy with the results!”



# MEREDITH WELLNESS VISION STATEMENT



**Steve Lacy**  
Chairman and CEO

Studies show healthy employees are more engaged, more productive, and tend to have lower health care costs. Therefore at Meredith, creating a strong and healthy workforce is part of our overall business strategy. We take great pride in creating a quality work environment and understand that Meredith employees are our greatest asset. We believe it is our responsibility to promote wellness and a healthy lifestyle through educational programs and resources designed to enhance the health of our workforce. We must teach employees how to take personal responsibility for their health and the health of their families. At Meredith we believe this shared-responsibility approach will allow employees to have access to the resources and education needed to adapt healthy lifestyle behaviors and encourage others to do the same.

We aspire to develop employees into smart and savvy health care consumers and have implemented – and will continue to implement – health care consumerism initiatives designed to enhance this ability. We are committed to offering a regular health risk appraisal and wellness screenings. Our programs are designed to educate employees on their

personal health status and on the overall health status of our workforce, so everyone understands the strengths and opportunities for improvement. Meredith is committed to providing resources necessary to help our workforce address high-risk areas in addition to maintaining and growing the percentage of employees in the low-risk population. We make wellness initiatives and the health risk appraisal and wellness screenings available to spouses.

Our vision includes helping employees understand their role in our wellness initiative. Our “Strive for 85” motto indicates our vision for 85% of our workforce to participate in the health risk appraisal and wellness screening, and for 85% of screening participants to be in the low-risk category by having two or fewer risk factors. We’re currently at 92% employee participation in the health risk appraisal and wellness screening and 87% of the participants are in the low-risk category.

Our overriding goal is to develop a healthier and more productive workforce through a comprehensive health and wellness strategy that allows employees to live longer, happier lives, leading to an enjoyable retirement. We aspire to be one of the nation’s healthiest companies and believe we have the right initiatives and wellness team in place to make significant progress toward making our vision a reality.

**Steve Lacy**  
*Chairman and CEO*



## A Dynamic Incentive Structure

Meredith uses a robust incentive structure to drive high engagement using several forms of recognition. Meredith employees earn three primary types of incentives for their wellness efforts, which include Wellness Points that accrue towards a discount on health insurance premiums, a Well-Bucks redemption program for employees to purchase fitness equipment and other health-related items, and Health and Wellness reimbursements for healthy lifestyle activities.

Other small gifts recognizing employee participation may include signed certificates from Meredith CEO Steve Lacy, Meredith Wellness-branded gym bags or workout shirts, vendor-donated fitness gear and clothing, and other similar items.

### 1. WELLNESS POINTS

Employees who earn 1,000 points through participation in the Meredith wellness program receive a discount on their health insurance contribution (or a credit if they don't participate in a Meredith health plan). In 2011, benefits eligible employees earned points by completing wellness activities throughout the year – such as the annual health risk assessment, Live Healthy Meredith and tobacco cessation programs. If an employee accumulated at least 1,000 points by September 30, 2011, he or she earned a \$500 discount on his or her Meredith medical plan in the 2012 calendar year.

Meredith employees earned Wellness Points by meeting the following requirements for 2011 wellness challenges:

- **Complete the Live Healthy Meredith Campaign (January 17-March 11) – 200 points**
  - ✓ Record your weight and/or activity minutes during the eight-week challenge and receive 200 wellness points.
- **Complete the Personal Financial Wellness Check-up (in April) – 200 points**
  - ✓ Answer a series of financial wellness questions and receive a personalized year-over-year report and financial wellness score.
- **Complete the Nutrition Education Campaign (in May) – 100 points**
  - ✓ Learn more about healthy eating and track your food intake for one week online.
- **Complete the Medical Self-Care Assessment (in June) – 100 points**
  - ✓ Learn how to use the health care system to your advantage to improve your health and the health of your family.
- **Complete the Health Risk Assessment/Wellness Screening (in July) – 300 points**
  - ✓ Answer a series of healthy lifestyle questions and complete the wellness screening to receive a personalized year-over-year health status report.
- **Affirm Your Tobacco-Free Status or Complete a Tobacco Cessation Course – 350 points**
  - ✓ Learn more about the benefits of quitting tobacco and set a quit date if you are ready. It takes the average person seven times to quit, so each time you try you are one step closer. If you don't use tobacco, confirm your tobacco-free status online and automatically earn these points.

## WHAT MEREDITH EMPLOYEES ARE SAYING...

I think this type of program is valuable because many people won't do the work without some incentive.



## MEREDITH'S PLATINUM INITIATIVES

### Tobacco Cessation

Last year, a tobacco user on Meredith's health plan averaged \$3,900 in claims and 14 doctor's visits compared to just \$1,300 in claims and 9 doctor's visits among non-tobacco users.

However, Meredith has successfully reduced tobacco use from 11% in 2007 down to 4% in 2011 – This is largely due to enforcing a tobacco-free workplace since January 1, 2008. In the last two years, 56 employees have quit tobacco (with annual claims savings of \$2,600 each), which means a \$145,000 annual savings moving forward. Meredith's cost for the tobacco cessation program since 2010 is a little more than \$20,000, which equals a \$7:\$1 ROI!

Meredith has partnered with Health Solutions to provide a tobacco cessation program to employees who currently use tobacco products. By completing the program, participants can earn 350 wellness points. If an employee does not currently have a tobacco habit, he or she will automatically be given the 350 wellness points. Employees have the opportunity to participate in group or individual coaching sessions that incorporate techniques, tips and tools that can be used to combat tobacco addiction.



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### 2. WELL-BUCKS

Meredith awards “Well-Bucks” to full-time or part-time benefits-eligible employees who participate in qualifying wellness initiatives throughout the year. An announcement is made in advance of qualifying campaigns and employees don't even need to participate in a Meredith medical insurance plan to earn or redeem Well-Bucks.

Well-Bucks can be redeemed for:

- Athletic Shoes
- Fitness Apparel
- Therapeutic Massage
- Pre-Retirement Financial Counseling
- Exercise/Fitness Equipment (such as a treadmill, hand weights or a home gym)

### 3. REIMBURSEMENT PROGRAMS

Meredith subsidizes five areas of wellness for active full-time or part-time benefits-eligible employees. Employees may apply for reimbursement in each category:

- Health Club Membership (Reimbursement amount varies by Meredith location)
- Nutrition Counseling (\$100 per year)
- Group or Personal Training (\$100 per year)
- Organized Activity/Sports League (\$100 per year)
- Tobacco Cessation (\$750 lifetime benefit)
- Bicycle Commuting Expenses (up to \$240 per calendar year). See Appendix C for Bicycle Commuting Reimbursement Requirements.

Employees provide receipts for covered expenses and submit applications for reimbursement. Employees can visit [www.MeredithWellness.com](http://www.MeredithWellness.com) to learn more and to start earning and tracking rewards.

See appendices A, B, C for sample reimbursement policies.

### WHAT MEREDITH EMPLOYEES ARE SAYING...

“This is a great program that motivates employees to stay on track and achieve their goals.”

## Integration and Technology

One of the most innovative aspects of the Meredith wellness program is its website, [www.MeredithWellness.com](http://www.MeredithWellness.com). Through the website, Meredith is able to offer a fully customized health and financial wellness resource for its employees. It's an innovative tool that incorporates the incentive structure and delivers programs to remote employees using mobile devices.

The Meredith Wellness Team along with Holmes Murphy and Meliora Technology has spent much of their energy developing the site so that Meredith Wellness participants can register for initiatives and participate directly through [MeredithWellness.com](http://MeredithWellness.com). Employees can log into the Meredith Wellness site to register for any program, create teams, track progress and receive incentives. Different campaigns are built into the site, allowing Meredith employees and their families to access Meredith wellness programs anywhere, any time.

## PROOF IS IN THE NUMBERS

To establish the proper metrics for analysis, leadership support is a critically important step in gaining resources and the employee attention needed for a program to experience continued success.

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**MeredithWellness.com:** Participants can log in to participate in incentive campaigns, earn and redeem rewards, view their health history, enroll in financial workshops, complete wellness or tobacco cessation coaching, access health resources and more!

**PASS IT ON!**

Know someone who would enjoy this?  
[Click here](#) to send them a copy.

★ [www.welcoa.org](http://www.welcoa.org)

**WELCOA's Well  
 Workplace Model  
 Offers Results**

[www.welcoa.org/wellworkplace](http://www.welcoa.org/wellworkplace)

Meredith also works with a variety of wellness vendors, selecting its wellness resources not only because of how user-friendly and cost-effective the products are, but primarily on their ability to integrate with the Meredith Wellness platform. Meredith uses its online wellness platform to integrate data feeds from vendors and to deliver both customized and plug-and-play wellness programming to employees. Meredith's vendors also track and report participation numbers, which enables incentives to be automatically awarded on participant's Meredith Wellness dashboard.

“We aspire to be one of the healthiest companies in the nation.”

With its powerful online platform, and by incorporating technology to deliver its wellness programming, Meredith has seen wellness participation numbers growing by leaps and bounds. For example, Meredith saw its Wellness BINGO campaign grow from 80 participants in 2009 (using hard-copy tracking only) to more than 600 participants in 2010, when the program could be completed online.



**Wellness** bingo

|   |  |   |   |   |
|---|--|---|---|---|
| Call a friend or send a note telling them how much you appreciate their friendship. | Replace three soda or coffee drinks with either water, milk, or fruit juice this week. | Sit down with a good book or magazine to calm your mind before bedtime twice this week. | Take a 10-minute stretch break at work at least three times this week.                                  | Have your blood pressure checked once this week.  |
| Park farther from the building three days this week.                                | Exchange two snacks this week with a healthier choice, such as fruit or yogurt.        | Do a set of 20 situps/crunches and 20 push-ups three days this week.                    | Keep a food journal at least three days this week, recording when, what, and how much you ate that day. | Reserve at least 30 minutes for relaxation alone or with friends or family twice this week.     |
| Make a healthy lunch choice three times this week.                                  | Drink 6-8 eight-ounce glasses of water every day this week.                            | <b>COMPANY WALK</b>   | Exercise with a co-worker at least three days this week for 30 minutes.                                 | Enjoy nature by heading outside to walk, run, or bike twice this week.                          |
| Locate the nearest defibrillator in your workplace.                                 | Do one random act of kindness for someone you care for this week.                      | Walk stairs 3 days this week.   | Watch a funny movie, laugh with friends, or read the comics once this week.                             | Replace one morning or afternoon coffee break with a short walk inside or outside the building. |
| Eat 1-2 servings of fruits and vegetables at least four days this week.             | Look up the nutrition information for your favorite restaurant meal.                   | Make a conscious effort to recycle this week.   | Vary your workouts by doing a different form of exercise three days this week.                          | Schedule your annual exam and any necessary screenings this week.                               |

## Designing It Right

The foundation of a successful wellness initiative begins with a well-thought-out, results-oriented program design.

For Meredith, this includes collecting data to identify areas of strength and opportunities for improvement and then crafting an array of motivating, inspiring and fun wellness programs designed to engage employees and families, and improve health. In addition to robust data analytics, Meredith has successfully delivered best-in-class wellness solutions with proven results. A key to Meredith's success is its fully integrated program, which leverages technology and service providers to deliver real-time, valuable rewards to employees who participate.

## II. Delivering A Wellness Program

*When it comes to delivering a results-oriented wellness program, Meredith is at the top of its game. In the following pages, you'll get an inside look at some detailed examples and find out how this company does it. The next pages illustrate how Meredith succeeds at keeping employees engaged while striving to improve the health and vitality of its workforce.*

### Participation And Employee Engagement

Meredith has achieved a high level of participation since the wellness program inception in 2006. Leadership support, a robust incentive structure, best-in-class program design and a strong culture of wellness have all contributed to the 90%+ participation Meredith currently achieves within its wellness initiative.

### Family Involvement

In addition to eligible employees, most Meredith wellness initiatives are available to employees' families—and employees are encouraged to involve their spouse or domestic partner and other family members. Family members of Meredith employees can participate in initiatives, utilize Meredith's onsite fitness facility, and take part in many coaching sessions with their spouses or loved ones. One of the most effective campaigns was the Live Healthy Meredith weight loss initiative last year, in which more than 200 families participated—in addition to the 70% participation rate of the Meredith employee population.

Meredith Wellness is family-friendly and incorporates family involvement into the wellness initiative in many ways. Here are some of Meredith's family friendly approaches to wellness:

- Free onsite fitness center and group exercise classes are offered at Des Moines headquarters and are open to employees and their spouse or significant other.
- Onsite financial workshops and financial planning sessions are offered at all locations for employees to attend with their spouse or significant other.
- Spouses are encouraged to participate in all incentive campaigns, and can win prizes and earn rewards.
- Spouses or significant others are invited to participate in sessions with tobacco cessation or wellness coaches.

## MEREDITH'S PLATINUM INITIATIVES

### Financial Wellness Check-Up

In addition to physical wellness activities and as part of the Wellness Points program, Meredith employees complete a financial wellness checkup to assess their level of financial well-being, including their rate of savings, cash flow monitoring and understanding of employee benefits.

The Personal Financial Wellness (PFW) Checkup was designed for Meredith by the Personal Finance Employee Education Foundation (PFEFF). Meredith employees earn Wellness Points toward a discount on their insurance premiums by completing the 20-minute questionnaire. Over 70% of employees participate. The PFW Checkup benchmarks any stress on cash flow, the employee's rate of savings, his or her level of understanding of employee benefits, and an overall level of financial well-being. Participants receive a personalized report with a Financial Wellness Score and a customized action plan based on their responses and programming provided by Meredith.

This program is designed to help reduce the level of financial distress among Meredith's workforce, which also correlates to lower levels of stress-related illness, excess medical costs and diminished productivity. Participants learn skills to improve cash flow and eliminate living paycheck-to-paycheck by developing a comprehensive financial plan. Meredith strives to help employees improve their rate of savings and gain a greater understanding of employee benefits. With the PFW being followed up by 45% of participants who attend financial wellness workshops, Meredith has seen its employees' financial wellness indicators—such as financial distress versus well-being, cash-flow stress, low versus high rate of savings and confidence levels—significantly improve across the board from 2010 to 2011.



## MEREDITH HEALTH & WELLNESS AWARDS

Hundreds of Meredith employees have been positively impacted by the Meredith wellness program. The success stories are celebrated every year through the Meredith Health & Wellness Awards. Each April, employees nominate themselves and their colleagues for a wellness leadership award and/or a health improvement award. Every year, through this awards initiative, employees who have made great strides toward enhancing health and well-being are recognized, and their stories are shared to inspire others. Awards are given in two categories: Lifestyle Change and Wellness Leadership. Listed here are just some of the inspiring messages that were written by and about the Meredith Health and Wellness Award winners:

*Michael went from being an overweight smoker to exercising twice daily and making better lifestyle choices. "Michael is an inspiration to all his co-workers and family. He gets up at 4 a.m. to work out in order to spend time with his wife and two boys in the evening," said his co-worker.*

*One day Eddie took a picture of himself, pasted it to his refrigerator door, and decided to begin his path to weight loss through omitting soda from his diet. Since 2009, Eddie has made even bigger strides to lose more than 130 pounds, and drop from a 46 to 34 inch waist. "Eddie is an inspiration because he quietly set a goal and exceeded it without external fanfare," said his colleagues.*

*In addition to making personal positive lifestyle changes, Selena has encouraged others to do the same, by initiating group lunch workouts or gathering people to go walking or use the stairs. Selena is known for sending uplifting, colorful emails to encourage her co-workers to keep up their hard work, or to let everyone know about a new workout idea or a tip. "Selena is a fabulous leader and an inspiration to all of us," said a colleague.*



- Meredith's Employee Assistance Program is available to all employees and family members, and includes in-person appointments, life coaching, legal services, financial consultations and eldercare resources.
- Families can join teams for community events such as the Heart Walk and Race for the Cure.
- Employees and their families can subscribe to monthly health and financial wellness e-newsletters.

Plans are in place to offer spouses and domestic partners of Meredith employees more opportunities over the next two years—including participation in the fall wellness screening and wellness points initiatives (to earn dollars in a HRA or HSA account).

### Inspiring Employees

Meredith shares employee testimonials (taken from post-program evaluation comments) during its wellness campaigns to motivate and inspire participants. Throughout the WELCOA case study, you'll see some of these testimonials from Meredith employees.

The timing of incentives is important for keeping an employee connected to the progress he or she is making, so Meredith balances its incentive-giving at a frequency that keeps employees feeling engaged and willing to do more—such as a weekly drawing for employees who've tracked their progress throughout the week. Additionally, evaluation, prize distribution, celebration and conclusion of a program happen shortly after the program ends, so participants don't become detached from the positive momentum that was building during the campaign. Communications continue throughout the campaigns to further encourage participants, and keep employees updated on how Meredith Wellness is doing in terms of its overall progress and goals.

At an annual celebration known as the Meredith Health and Wellness Awards, Meredith acknowledges and honors its employees' success. Every spring, employees can nominate themselves or their colleagues for a wellness leadership award and/or a health improvement award. Employees who have gone 'above-and-beyond' to improve their health and well-being or to help others succeed are recognized at the awards ceremony, and their inspiring stories are shared at this special event and throughout the company.

**BONE BUILDERS** Name: \_\_\_\_\_  
Mail Stop/Location: \_\_\_\_\_

October 22 is World Osteoporosis Awareness Day. Regular strength training is a key element of optimal bone health. The 4-week Bone Builders initiative will be held Monday, October 22 - Friday, November 16. Your goal is to complete these strength training sessions per week for four weeks.

Benefits-eligible employees will receive \$25 Well-Bucks for submitting a completed tracking sheet and all other participants submitting a completed sheet will be entered in a drawing to win one of several wellness prizes.

Each time you complete a strength training session of 20 minutes or more, shade in one of the twelve parts in the skeleton shown below. Employees and family are welcome to participate.

| DATE WORKOUT COMPLETED: | AREA TO COLOR:             |
|-------------------------|----------------------------|
| _____                   | SESSION #1 HEAD            |
| _____                   | SESSION #2 SPINE           |
| _____                   | SESSION #3 RIGHT SIDE RIBS |
| _____                   | SESSION #4 LEFT SIDE RIBS  |
| _____                   | SESSION #5 FEET            |
| _____                   | SESSION #6 RIGHT ARM/HAND  |
| _____                   | SESSION #7 LEFT ARM/HAND   |
| _____                   | SESSION #8 UPPER RIGHT LEG |
| _____                   | SESSION #9 LOWER RIGHT LEG |
| _____                   | SESSION #10 UPPER LEFT LEG |
| _____                   | SESSION #11 LOWER LEFT LEG |
| _____                   | SESSION #12 BOTH FEET      |

Contact Meredith Wellness Manager Tim O'Neil at 515-284-2957 or email [wellness@meredith.com](mailto:wellness@meredith.com) with questions, or for strength training programs. Turn in your completed sheet by November 16 via: Intra-office mail at 15-093, fax at 515-284-2189, or scan and email to [wellness@meredith.com](mailto:wellness@meredith.com).

**Bone Builders:** Participants who record 12 strength training sessions on the [www.MeredithWellness.com](http://www.MeredithWellness.com) site during the four-week campaign receive \$25 Well-Bucks.

## Meredith Communication Strategies

Once employees get started in the Meredith wellness program, ongoing communications and programming choices keep them engaged. According to Meredith Wellness Manager, Tim O’Neil, “Meredith offers a variety of programs to appeal to a diverse workforce with many interests and stages of readiness to change. By offering initiatives throughout the year, we can ensure that we have the right program to engage an employee when he or she is ready to make a lifestyle change—and our worksite culture supports it. Timing is everything, so we offer programs that fit together and keep the momentum going.”

Meredith Wellness specifically designs its employee communications to deliver program messages with maximum impact. The following strategies are used to ensure employee engagement for Meredith’s ongoing program initiatives:

### ✓ LAUNCH VIA LEADERSHIP

Most major campaigns and initiatives are kicked off by employee communications that come directly from Chairman and CEO, Steve Lacy. Meredith believes its kick-off communications drive participation. The Meredith Wellness Team realizes how crucial it is for employees to recognize that Meredith leaders offer their full support of the wellness program.

### ✓ OFFER GREAT MATERIALS

Because Meredith is a media and marketing company, the development of engaging marketing materials and a robust employee website has been a high priority. Along with targeted email blasts, a weekly e-newsletter outlining current initiatives is sent to employees. The Team tries to provide the right program at the right time, so that when an employee is ready to make a lifestyle change, there is a communication piece available that provides him or her with the steps that person can take to get started.

### ✓ PERSONALIZE MESSAGES

Targeted messaging is sent to employees based on their registration status. For example, those who have not yet registered will receive a prompt to sign up and additional information about the program, whereas those who have registered receive a thank you note and encouragement to recruit their colleagues to participate. By leveraging technology and sending personalized communications, Meredith can ensure that messages are always timely and relevant, based on a participant’s status in the program. Meredith avoids a one-size-fits-all communication approach so that employees don’t get burned out with too many communications.

### ✓ ESTABLISH WELLNESS TEAMS

Once an employee is engaged, Meredith leverages wellness teams to maintain that engagement. For example, team captains during a weight loss challenge kept their teams motivated by hosting healthy team lunches and group workout sessions.

## WHAT MEREDITH EMPLOYEES ARE SAYING...

“I appreciate the incentives, and also the maintenance program. Just having this program makes me more mindful of my behaviors.”

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### WELCOA Members Get Free Incentive Campaigns

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**Medical Self-Care**

Meredith participants learn about using the health care system to their advantage to improve their health and the health of their family using WELCOA's Self-Care Essentials.

**Meredith Wellness Budget**

Meredith has received strong senior-level backing in the form of moral and financial support; both of which have been critical to the program's success. Meredith's annual wellness budget is outlined below.

As you can see, Meredith has accomplished a lot with the resources that have been allocated to the program; and based on the program's ROI statistics (see page 17), it has been money well spent.

Meredith spends approximately \$190 per employee on wellness each calendar year. The Meredith wellness program costs \$550,000 annually, and includes the Meredith wellness website, annual health screenings, health coaching for at-risk participants, targeted campaigns and interventions, incentives, tobacco cessation, financial wellness workshops and one-on-one sessions.

**Meredith Wellness Budget Breakdown:**

- \$185,000 – Wellness Screening and Health Coaching
- \$175,000 – Financial Wellness
- \$150,000 – MeredithWellness.com Website
- \$25,000 – Awards and Incentives
- \$15,000 – Tobacco Cessation

Not included are the annual costs of an onsite medical clinic, the Wellness Manager's salary, group exercise instruction, or the costs of Meredith's wellness reimbursement programs. These items total an additional \$600,000, but come from separate/larger budgets (Employee Benefits, etc.) that also include non-wellness related items.

**Meredith's Onsite Medical Clinic**

Although the wellness program was formally established in 2006, the onsite medical clinic helped establish a culture of wellness long before Meredith began offering financial workshops and incentive campaigns. Meredith has had an onsite clinic for more than 90 years with occupational health roots dating back to the days when Meredith did the majority of its printing onsite.

Overseen by the Corporate Health Department, the onsite clinic has been designed holistically to address employees' multifaceted concerns, with emphasis on health maintenance through active screening, prevention, education and physical fitness for all employees.

The clinic is staffed with a full-time RN, two part-time RNs, a medical receptionist and visiting physicians (four hours, two days per week) who conduct employee physicals and take walk-in appointments.



Meredith's Corporate Health Department helps employees identify and manage new or existing medical conditions and provides medical assistance and education for a multitude of health-related matters. With the clinic, this department provides ongoing access to medical professionals and employee education on matters of personal long-term health. Results from corporate health exams are explained to each individual so he or she can become more familiar with his or her personal medical status and become a wise health care consumer.

### Containing Costs

Meredith's Corporate Health Department plays a vital role in health care cost containment through its services of health promotion, health preservation and disease prevention.

In addition, employees can use lab work collected through the onsite clinic for multiple records—such as using their blood-work results from a company physical exam towards their annual screening information. Over the last three years, Meredith has saved over \$50,000 in wellness screening costs simply by allowing employees to use their company physical blood draw in place of the annual screening.

Employees can call to speak to a nurse any time – Meredith has an after-hours nurse line dedicated to employees and families during evenings, holidays and weekends. The program also provides a companywide lending library that allows employees and family members to check out books, videos and other resources.

#### Key Features Of The Onsite Clinic:

- The onsite clinic provides traditional health care services such as screening exams, employee physicals and first aid consultations.
- The clinic reviews, interprets and approves all FMLA/Disability and work-related issues.
- The clinic serves as a confidential liaison between employees and management.
- Clinic staff members oversee the companywide emergency planning and response efforts including AEDs and CPR training, flu shot campaigns and blood drives—and provides guidance on other issues (i.e. H1N1, etc.) as needed.

#### WHAT MEREDITH EMPLOYEES ARE SAYING...

“I'm glad that Meredith is being a leader in helping keep its employees fit and healthy. The no-smoking was tops on my list (THANK YOU!), and caring about the overall health and fitness of its employees makes me proud to tell people that I work for a company that really does value its employees. Full circle, we not only tell our readers and subscribers how to succeed, we work for a company that encourages us to practice what we preach.”



# PROOF IS IN THE NUMBERS

Wellness Manager, Tim O'Neil's advice is that "you'll need to learn how to speak the executive language. Find out how your leaders define success and then make sure you can measure the impact of your wellness program so that 'offering wellness' becomes an easy decision. If you are unable to measure the results against your expenses for the program, in an increasingly challenging economic environment, it may be difficult to continue to receive funding."

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## Building An Electronic Medical Records System

Meredith's clinic is currently implementing an Electronic Medical Records (or EMR) system to capture the value of all procedures performed "in house" and compare savings against the same services that would be charged against the medical plan if an employee were to be seen at an offsite facility. Meredith hopes to have a full medical clinic ROI model in place later this year.

The EMR will integrate with the MeredithWellness.com site for employee benefits as well. For instance, employees can earn wellness points by being up to date on preventative exams, such as having their company physical. Employees will also be able to access a patient portal that allows them to create a portable electronic health record and track their visits to the onsite clinic, then share that info with their primary care physician. Meredith hopes this will eliminate any duplication of services and provide a better health consumer experience.

## III. Outcomes

*In the next section, Meredith's Wellness Team shares some of the strategies that are used to measure the impact and track the results of the company's wellness program.*



**Nutrition Education:** Participants learn about healthy eating and track their food intake for one week online to earn wellness points.



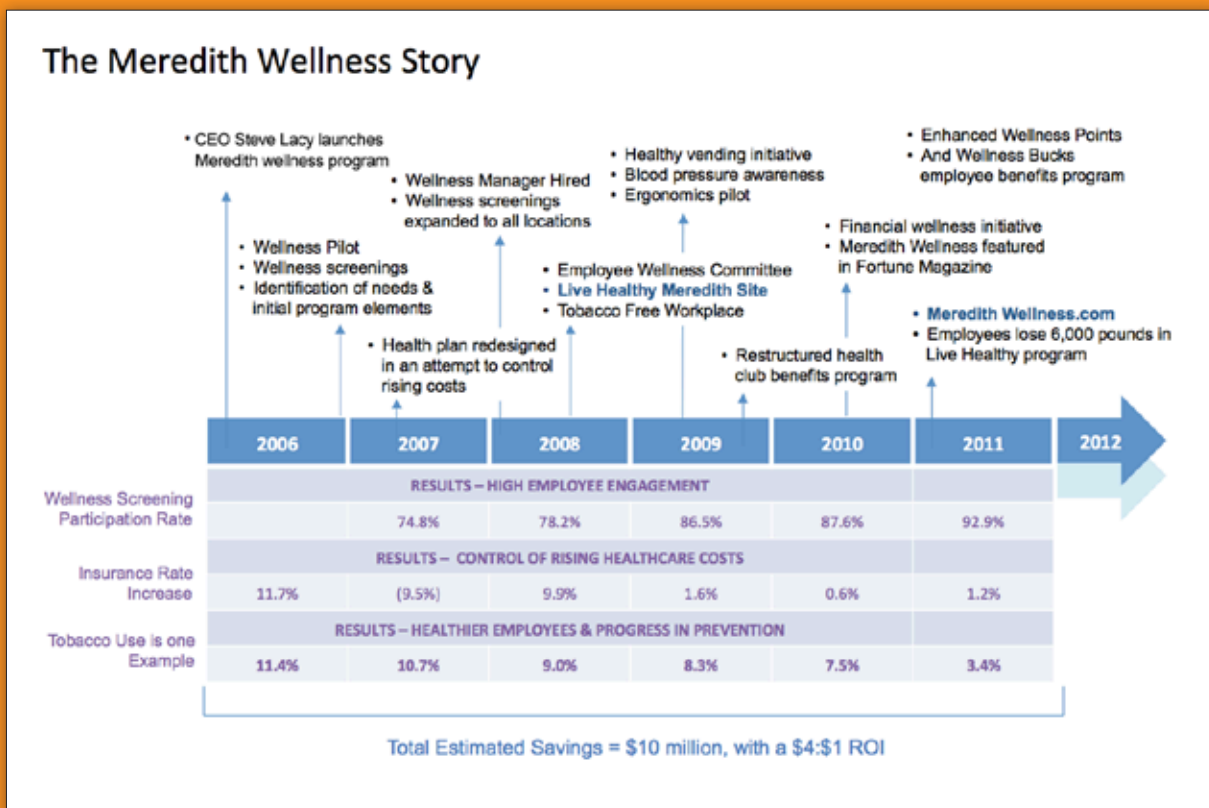
# MEREDITH WELLNESS ON-THE-GO

With its worksites so geographically dispersed, Meredith needs innovative strategies to engage employees and their families in fun, motivating and inspiring health improvement initiatives. By leveraging technology and the Meredith wellness website, the company can make programs portable and allow employees to participate at the time that works best for them. This leads to significantly greater participation, employee acceptance and support because wellness is made fun and easy. According to Meredith, it's a plus to be able to streamline the program administration on the Meredith wellness website. That way, our Wellness Manager is not stuck counting hundreds of completed tracking sheets and managing awards in an Excel spreadsheet—everything is automated!

A good example of this technology can be found within Meredith's financial wellness program. Employees can log in to the Meredith Wellness site from their work or home PC, iPad, or mobile phone and complete the Personal Financial Wellness Checkup (or PFWC)—which is similar to a health risk assessment, but for personal finance. They receive Wellness Points automatically upon completing the PFWC. The site provides a personalized recommendation for any and all Meredith programs and resources that would be a good fit based on that employee's individual responses. The employee would then have the opportunity to register for recommended programs—right then and there.

After registering, an employee has the opportunity to attend sessions in person and/or complete sessions online. He or she can attend a financial seminar in person and then catch the next workshop on an iPad on the train during his or her morning commute, or on the phone in the airport. The site recognizes completion based on the instructor updating class attendance, or by tracking when an employee watches a video series.

Awards are automatically distributed once a course is completed and the employees can redeem them directly through the site and receive reimbursement payouts on their next paycheck. The site automatically tracks participation and year-over-year financial wellness improvement of participants compared to non-participants. Meredith can send targeted messages to employees based on whether they have completed certain courses or not—and also to those who may have started, but not finished a course.



**WHAT MEREDITH EMPLOYEES ARE SAYING...**

“Meredith is an impressive example of what companies can do to reduce costs when they commit to providing much needed health management to their employees.”

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**How Meredith’s Program Is Evaluated**

Meredith evaluates its wellness program by looking at three main data types.

- Participation: Employee engagement and participation in the program
- Risk-Reduction: The health improvement of those participating
- Bottom-Line Results: The overall impact on company health plan costs and medical savings

Meredith collects other data such as miles walked, pounds lost, and participant satisfaction and feedback. However, at the end of the day, the Meredith Wellness Team feels the most important number comes from engaging the highest number of employees in programs that improve health and lower costs.

All data is evaluated upon the conclusion of each campaign or initiative. Additionally, the overall Meredith wellness program is evaluated—and health improvement and medical plan impact measured—on an annual basis. This information is shared with senior leadership and the Meredith Board of Directors.

**PARTICIPATION RATES**

As in many programs, participation in the Meredith wellness program is defined by the number of employees completing an initiative based on the total number of employees that are eligible for the initiative.

Ninety-two percent of Meredith employees participated in the wellness program in 2011, each earning 1,000 Wellness Points.

**12 days of wellness**  
 Monday, November 29 — Friday, December 24

*"On the first day of wellness, I gave myself a gift..."*

For many of us, the holidays are often the busiest time of the year. With the rush to buy gifts, spend time with family and friends, finish year-end work commitments and plan for the New Year, personal wellness tends to get pushed off our to-do lists. This challenge is a fun way to stay active, control stress and enjoy a healthier holiday season (not to mention a great way to gear up for Live Healthy Meredith).

Simply complete 12 of the wellness activities listed on the next page within the 4-week period of the holiday season. Record each time you complete an activity (example: mark #7 on December 9th if you completed 50 sit-ups that day) - and only count each activity once during the program. Challenge your co-workers and family members - how many items can YOU accomplish? Send your completed calendar to [wellness@meredith.com](mailto:wellness@meredith.com) or fax it to 515-294-2188.

Benefits-eligible employees can complete 12 days of wellness and earn \$25 Well-Bucks. All employees and family can earn a chance in the post program prize drawing by completing 12 days of wellness, or two chances in the post program prize drawing by completing 20 or more days of wellness!

| SUNDAY                                | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY  |
|---------------------------------------|--------|---------|-----------|----------|--------|---|
| Sample:<br>29<br>30<br>Did dance only | 29     | 30      | 1         | 2        | 3      | 4   |
| 5                                     | 6      | 7       | 8         | 9        | 10     | 11  |
| 12                                    | 13     | 14      | 15        | 16       | 17     | 18  |
| 19                                    | 20     | 21      | 22        | 23       | 24     | Questions?<br>E-mail:<br><a href="mailto:wellness@meredith.com">wellness@meredith.com</a> |

**AVOIDING HOLIDAY WEIGHT GAIN MAY BE MOTIVATION IN ITSELF, BUT PRIZES HELP!**

Benefits-eligible employees can complete 12 days of wellness and earn \$25 Well-Bucks. Employees and family can earn a chance in the post program drawing by completing 12 days of wellness, or two chances in the post program prize drawings by completing 20 or more days of wellness for a chance to win one of several wellness-themed prizes!

Want to do more?  
 Need exercise tips/workout ideas?  
 Contact: [wellness@meredith.com](mailto:wellness@meredith.com)

**12 Days of Wellness:** This challenge is a fun way for participants to stay active, control stress and enjoy a healthier holiday season by completing fun challenges such as dancing to holiday music.

In addition to reaching a 92% participation rate, Meredith employee health improved significantly, with 87% of employees falling in the low-risk category. Based on achieving its “Strive for 85” goal of 85% participation and 85% low-risk, Meredith has since set a new goal to reach a 95% participation rate next year and achieve 85% of participants having two or fewer of the five risk factors for metabolic disease. By setting higher standards, Meredith believes it encourages its Wellness Team to continue working toward the goal.

## How Do You Spell Success?

In 2011, Meredith achieved the following outcomes from its wellness efforts:

### 1. CHANGE IN CLAIMS

- From 2006-2011, Meredith reduced its annual health care cost per employee to a 0.9 % increase (improvement over 18.5% increase in 2004-2006).

### 2. HEALTH IMPROVEMENT & RISK REDUCTION

- Meredith saw a major reduction in health risk, moving from 13% to 4% of employees in a high-risk category.
- Tobacco cessation was one of the most successful programs, reducing employee tobacco use from 11% to 4%.

### 3. PARTICIPATION & IMPACT ON CULTURE

- 95% of employees completed the personal financial wellness checkup, (which is similar to a financial wellness HRA); with 45% of employees completing one or more financial wellness workshop(s).
- 92% of employees participated in the annual wellness screening (an improvement over 64% in 2007).
- Meredith has a 90% completion rate in the tobacco cessation program, and of those who complete the program, 80% stay tobacco-free for more than six months.
- Meredith employees have lost 21,000 pounds in the Live Healthy Meredith campaign since 2006.

## Live Healthy Meredith

|  | 2007  | 2008  | 2009  | 2010  | 2011  | Total  |
|--|-------|-------|-------|-------|-------|--------|
| <b>Number of Participants</b>                  | 449   | 910   | 841   | 1,618 | 2,152 | 5,970  |
| <b>Number of Teams</b>                         | 92    | 131   | 132   | 275   | 393   | 1,023  |
| <b>Total Activity Minutes</b><br>(in millions) | 1.1   | 2.8   | 2.4   | 3.8   | 4.6   | 14.7   |
| <b>Total Weight Loss</b><br>(in pounds)        | 2,715 | 3,993 | 3,236 | 4,923 | 6,021 | 20,888 |

Figure A

## MEREDITH'S PLATINUM INITIATIVES

### Live Healthy Meredith

Out of 610 companies participating in the 2011 Live Healthy program, Meredith led all companies in participation—and finished 2nd overall in activity minutes and 3rd overall in weight loss. Also noteworthy, in the same campaign in 2010, Meredith employees lost over 5,000 pounds and donated a meal to the local food pantry for every pound lost. That's over two tons of food!

Live Healthy Meredith is part of the national program, Live Healthy America, which has a goal to increase awareness of obesity and associated conditions, and to provide the tools, resources, and technology to assist individuals, organizations, and corporations in creating a culture of wellness. At Meredith, the campaign is an 8-week, teamwork driven program that's designed to motivate and teach individuals how to make positive and lasting changes and achieve a healthy lifestyle through increased physical activity, improved diet and weight loss. By competing, participants begin to form healthy habits through physical activity and improved nutrition.

As shown in figure A, over 70% of Meredith's workforce participated in the weight loss activity program in 2011. In eight weeks, participating employees lost a combined total of 6,000 pounds, making the 2011 weight loss challenge the most successful Meredith wellness campaign yet.



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**Keys To Success**

Meredith's keys to success include senior-level support and the ability to track and measure tangible results. Additionally, the work of employee wellness committees is critical. At multiple nationwide locations, the committees help the Meredith wellness team understand the needs and interests of the workforce so they can develop inspiring campaigns that motivate employees to take action. The committees also rally their colleagues at every location so employees continually participate and support the wellness program.

**Not Without Its Challenges**

Because Meredith has more than 20 locations across the country, developing an engaging wellness program for every audience can be a huge challenge. Every location has a unique organizational subculture, and for the Meredith Wellness Manager located in Des Moines, it can be difficult to engage employees that he may never meet in person.

“Health and wellness are priorities for our company and we will continue to be a leader in this area.”



## Moving Forward

The Meredith wellness program is currently expanding by taking content from the Meredith brands (*Better Homes and Gardens*, *Ladies' Home Journal*, *Parents*, *Fitness*, *Family Circle*, *More*, *EatingWell*, etc.) and combining tools, tips, downloads, videos, calculators, sample workouts, recipes and more with programs that are written for employees. The company wants to create a year-round calendar of wellness initiatives and supporting Meredith-branded content and resources, and integrate those into the current program for employees and their families.

## The Future's So Bright...

What's next for the Meredith wellness program? Over the next two years, the company is changing the Meredith Wellness Points program to incorporate wellness coaching and preventive exams. In addition, it's increasing the incentive amount on health plan contributions from a \$500 discount to a \$650 incentive that will be deposited into an HRA or HSA account (along with plan design changes to support this new strategy).

Meredith intends to include spouses in the program starting with the next wellness screening and incorporate them into the points program in 2013. In general, Meredith plans to increase its focus on employee and spouse/domestic partner engagement, with the ultimate goal of improving participant health and health care consumerism. ★

## MEREDITH'S BEST PROGRAMMING ADVICE

Meredith's Wellness Manager offers three key pieces of advice to help WELCOA readers in their quest to build effective, results-oriented wellness programs:

- 1) Establish a program framework from which you can measure the impact of your intervention.
- 2) Understand the needs and objectives of your business, and make sure you speak the executive language so you are doing things that are of value to the organization.
- 3) The more time you spend listening to employees and understanding their needs, the better you'll be able to develop campaigns that will impact lives. This will lead to better participation and outcomes, help enhance culture, and increase levels of support over time.



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## Appendix A

### Wellness Bucks (Well-Bucks) Approval and Reimbursement Guidelines

#### INTRODUCTION

As part of Meredith's comprehensive health and wellness initiative, Meredith will award "Well-Bucks" to **eligible employees** who participate in qualifying wellness initiatives throughout the year.

#### PROGRAM DETAILS

A Well-Bucks announcement will be made in advance of qualifying wellness initiatives. Employees can use Well-Bucks to be reimbursed for purchases including:

- Tennis Shoes
- Fitness Apparel
- Therapeutic Massage
- Exercise/Fitness Equipment (such as a treadmill, hand weights or a home gym)
- Pre-Retirement Financial Counseling
- Toward any of the current wellness reimbursement categories (health club membership, group/personal training, nutrition counseling, team sports leagues/single day events, tobacco cessation)

Employees may earn a maximum of \$125 Well-Bucks per year and "bank" a maximum of \$500 in Well-Bucks at any time. Well-Bucks eligible initiatives are held throughout the year and employees can track their Well-Bucks balance on the site.

The benefit will be provided through a cash reimbursement method. Employees will provide receipts for covered expenses. Applications for reimbursement must be received within 12 months of the incurred expense.

#### REMINDER

A personal physical fitness program should be a way of life and a continuing program of exercise and conditioning. A personal fitness program can make life more enjoyable and rewarding. Medical authorities advise that you check with your doctor before beginning any type of exercise program.

#### For questions on approval of qualifying expenses:

- 1. Secure documentation of the cost.**
- 2. Send this information, along with your name and extension, to [address@email.com](mailto:address@email.com) for approval.**

#### For reimbursement:

- 1. You may submit a claim for reimbursement once you have received approval on a qualifying purchase.**
- 2. After incurring qualified expenses, requests for reimbursement must be submitted within 12 months of when the expense was incurred. Remember to include copies of your receipts.**

**If you have any questions about this process, please contact CONTACT NAME at 555.555.1234.**

Under federal and state laws, money paid by the company through the wellness subsidy must be treated as having been paid directly to you and is subject to all applicable income taxes. Withholding taxes will be collected through payroll for this payment. The amount of your reimbursement will be added to your Statement of Wages (W-2) at the end of the calendar year.

Meredith reserves the right to review and revise the health and wellness reimbursement guidelines on an ongoing basis. Subsidy offered during the 2011 calendar year only and subject to review for continuation in 2012. Refer to the Employee Benefits Handbook for reimbursement guidelines if termination of employment occurs.

## Appendix B

# Health and Wellness Approval and Reimbursement Guidelines

### INTRODUCTION

As part of Meredith's comprehensive health and wellness initiative designed to enhance employee health and well-being, Meredith will subsidize five areas of wellness for **eligible employees**. Employees may apply for reimbursement in each category.

### HEALTH CLUB MEMBERSHIP

The company will subsidize a basic adult membership to a health club or gym that promotes cardiovascular wellness. An eligible facility must provide at least two pieces of equipment or activities that promote cardiovascular wellness such as a stationary bicycle, treadmill, elliptical cross-trainer, group exercise, squash/tennis/racquetball courts, stepper, rowing machine, walking/running group, indoor track or pool. Reimbursement amount varies by location. E-mail [address@email.com](mailto:address@email.com) to learn the reimbursement level at your location.

To be eligible for reimbursement, employees must turn in a list of visits generated by the facility. Employees will be reimbursed according to the following schedule:

- 100 or more visits/year = 100 percent of the reimbursement rate
- 75 or more visits/year = 75 percent of the reimbursement rate
- 50 or more visits/year = 50 percent of the reimbursement rate
- 25 or more visits/year = 25 percent of the reimbursement rate

Employees who log fewer than 25 visits will not be eligible for the subsidy. Reimbursement cannot exceed the total membership cost. See page 2 for detail on the process for pre-approval and reimbursement.

### NUTRITION COUNSELING

The company will reimburse up to \$100 per employee for nutrition counseling or related group programs each calendar year. The reimbursement may be used toward participation in an educational nutrition-related group or program (such as Weight Watchers or Jenny Craig, excludes books, food and nutritional supplements) and is based on successful completion of the group session. A minimum of 80 percent attendance is required. Reimbursement cannot exceed the cost of the class/group. The subsidy may also apply to nutrition-related counseling with a Registered Dietitian. Reimbursement of up to \$25 per session will be given, not to exceed the cost of the session.

### GROUP OR PERSONAL TRAINING

The company will reimburse up to \$100 per employee for either group fitness or one-on-one instruction each calendar year. The reimbursement may be used toward participation in a physical fitness class or group (yoga, water aerobics) based on successful completion of the group session. A minimum of 80 percent attendance is required; reimbursement cannot exceed the cost of the class/group. The subsidy may also apply to individual instruction with a Certified Personal Trainer. Up to \$25 per session will be reimbursed, not to exceed the cost of the session.

### ORGANIZED ACTIVITY/SPORTS LEAGUE

The company will reimburse up to \$100 per employee for activity-based leagues and events that promote cardiovascular wellness (such as soccer, basketball, road races and triathlons) each calendar year. Maximum reimbursement of \$25 per employee per league/event will be given, not to exceed the cost of a league or half the cost of a single event.

### TOBACCO CESSATION

The company will reimburse prescription and over-the-counter nicotine replacement therapies such as pills, patches, and gum up to \$750 maximum employee lifetime benefit (hold receipts up to \$325 and then submit). In addition, Meredith will reimburse 50 percent of the cost of an off-site tobacco cessation program. The maximum reimbursement is \$100 and will be paid at the completion of the program. Each employee is eligible for one reimbursement during his or her career at Meredith. You may select the program that is right for you. The Meredith Medical Department is available at 555.555.1234 for assistance in selecting an effective program.

### REMEMBER

A personal physical fitness program should be a way of life and a continuing program of exercise and conditioning. A personal fitness program can make life more enjoyable and rewarding. Medical authorities advise that you check with your doctor before beginning any type of exercise program.

**For facility or class/event approval:**

- 1. Secure documentation of the membership fee or activity cost.**
- 2. Send this information, along with your name and extension, to HR for approval.**

**For reimbursement:**

- 1. For a health club or gym, you may submit a claim for reimbursement once you have achieved 100 visits in a 12-month period, or after your one-year anniversary date. Remember to include certification of your visits from the facility and paid receipts.**
- 2. After completing a class, event or personal training, submit requests for reimbursement within 12 months. Remember to include copies of your receipts and attendance/participation tracking.**

**If you have any questions about this process, please contact CONTACT NAME at 555.555.1234.**

Under federal and state laws, money paid by the company through the wellness subsidy must be treated as having been paid directly to you and is subject to all applicable income taxes. Withholding taxes will be collected through payroll for this payment. The amount of your reimbursement will be added to your Statement of Wages (W-2) at the end of the calendar year.

Meredith reserves the right to review and revise the health and wellness reimbursement guidelines on an ongoing basis. Subsidy offered during this calendar year only and subject to review for continuation next year. Refer to the Employee Benefits Handbook for reimbursement guidelines if termination of employment occurs.

## Appendix C

### Meredith Employee Bicycle Commuter Subsidy Guidelines

#### INTRODUCTION

As part of Meredith's comprehensive health and wellness initiative designed to enhance employee health and well-being, Meredith will subsidize up to \$240 per calendar year toward bicycle commuting expenses for **eligible employees**.

#### BICYCLE COMMUTER BENEFIT

Employees regularly using a non-motorized bicycle for a substantial (50% or greater) portion of travel between the employee's residence and the worksite can receive assistance defraying some of the costs a bike commuter may incur. These costs may include the purchase of a commuter bicycle, commuting gear (helmet, gloves), bike lock, bike parking/storage, bike upgrades (lights, racks), repairs and general maintenance. These are considered reasonable expenses as long as the bicycle and equipment is regularly used for travel between the employee's residence and place of employment.

The benefit will be provided through a cash reimbursement method. Employees will log bicycle commuting sessions and receive \$20 per month for months in which they commute to and from work at least ten times. Employees will provide receipts for covered expenses and applications for reimbursement must be received by March 31 of the year after the employee incurred the expense.

Employees applying for the bicycle commuter subsidy are ineligible for other transportation benefits (transportation in a commuter highway vehicle, transit pass or qualified parking benefits) during the months they receive funds for bicycle commuting.

#### REMEMBER

A personal physical fitness program should be a way of life and a continuing program of exercise and conditioning. A personal fitness program can make life more enjoyable and rewarding. Medical authorities advise that you check with your doctor before beginning any type of exercise program.

#### For questions on approval of qualifying expenses:

1. **Secure documentation of the cost.**
2. **E-mail this information to [address@email.com](mailto:address@email.com) for approval.**

#### For reimbursement:

1. **Submit claims for reimbursement once per calendar year.**
2. **After incurring qualified commuting expenses, requests for reimbursement must be submitted by March 31 of the year after the expense is incurred. Remember to include copies of your receipts and commuter participation tracking.**

**If you have any questions about this process, please contact CONTACT NAME at 555.555.1234 or e-mail [address@email.com](mailto:address@email.com).**

Meredith reserves the right to review and revise the health and wellness reimbursement guidelines on an ongoing basis. Subsidy offered during this calendar year only and subject to review for continuation next year.