



12<sup>TH</sup> ANNUAL OHIO

*Employee  
Health &  
Wellness*  
CONFERENCE

# Workshop O

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*Best Practices in a Collective Bargaining Workplace*  
**Overcoming Significant Obstacles to an  
Unsustainable Health Insurance Plan and  
Methods to Achieve Substantial Gains in  
Implementing a Wellness Culture ... On the  
Road to Wellness – Achievements,  
Challenges & Vision for the Future**

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**3:00 p.m. to 4:15 p.m.**

## **Biographical Information**

**Kristen M. Treadway**  
**Vice President of Human Resources and Labor Relations**  
**Central Ohio Transit Authority**  
**33 N. High St., Columbus, OH 43215**  
**614-275-5848      treadwaykm@cota.com**

Kristen M. Treadway is the Vice President of Human Resources and Labor Relations for the Central Ohio Transit Authority which provides public transit to Columbus Ohio and various contiguous communities. As Vice President, Kristen oversees the Human Resource Division for COTA which provides service to more than 1 million citizens. In this position, Kristen is building a foundation for the division's day-to-day functions as well as its future operations. Relying on a rich accumulation of professional experiences, associations and education, Kristen is responsible for the ongoing administration, employee relations and strategic planning for the organization's approximate 1,000 full time and part time employees. As Vice President, she supervises all functions of the Human Resources Division including, but not limited to, creating departmental standards; policies and procedures; labor management committees; labor contract negotiations; benefit administration; compensation/classification systems; management coaching; workers' compensation and methods to ensure compliance with all applicable laws. Kristen has almost eighteen years in the public sector in addition to her years in the private sector.

Kristen graduated Cum Laude from the State University of New York, College at Oswego, with a Bachelor of Science in Business Administration. Kristen continues to expand her human resource expertise with continuing education opportunities and professional memberships. She holds a Professional in Human Resources (PHR) certification from the Human Resources Certification Institute, a Senior Certified Professional (IPMA-SCP) from the International Public Management Association, a Senior Certified Professional (SHRM-SCP) from the Society for Human Resources Management, and is a Certified Labor Relations Professional (CLRP) from the National Public Employer Labor Relations Association. She is also a member of the Society for Human Resources Management; the International Public Management Association for Human Resources; the National and Ohio Public Employer Labor Relations Association and is currently serving as Vice President for the Ohio Public Employer Labor Relations Association having previously served as Treasurer and Conference Coordinator. Finally, she is also a Board Member for the Transit Labor Exchange and serves as a member on the American Public Transportation Association Human Resources Committee and Labor Sub Committee.

## **Biographical Information**

**Stephanie Pulliam**  
**Compensation and Benefits Manager**  
**Central Ohio Transit Authority**  
**33 N. High St., Columbus, OH 43215**  
**614-275-5848      FAX: 614-275-5898      pulliamsl@cota.com**

Stephanie Pulliam is the Compensation and Benefits Manager for the Central Ohio Transit Authority, which is the regional public transit provider for greater Columbus and central Ohio. Stephanie is responsible for the direction and administration of all employee benefits, COTA's health and wellness programs and the compensation/classification system. Stephanie also serves as the Equal Employment Opportunity Investigation Officer for COTA. With approximately ten years of experience in the Human Resources industry, Stephanie provides leadership and expertise to help advance the organization's HR goals. Some of these achievements were making significant improvements to COTA's health and wellness program, which has allowed COTA to receive the 2014, 2016 and 2017 Columbus Business First Healthiest Employer Awards, the 2015 HR Excellence Award for Innovation and 2017 HR Excellence Award for Team Excellence by Columbus CEO magazine, and the 2016 Ohio and National Public Employer Labor Relations Associations Pacesetter Awards.

Stephanie graduated Magna Cum Laude from The Ohio State University with a Bachelor of Science in Health Sciences and a Bachelor of Arts in Psychology. As a member of the International Public Management Association for Human Resources; the National and Ohio Public Employer Labor Relations Association; and COSI's (Center of Science and Industry) Young Professional Board, Stephanie is focused on developing her knowledge in the HR Field and her professional network.



CENTRAL OHIO TRANSIT AUTHORITY

**On the Road to Wellness:  
Achievements, Challenges, and Vision  
for the Future**

**August 22, 2017**





*in 2012*

# WHERE WE WERE...

## ON THE ROAD TO WELLNESS



- Relationship with the Union was suffering
- Labor Strike in July 2012
- No trust between COTA and Union
- Unsustainable Health Insurance Plan
- Collective Bargaining Agreements specifically outline generous health insurance plan design

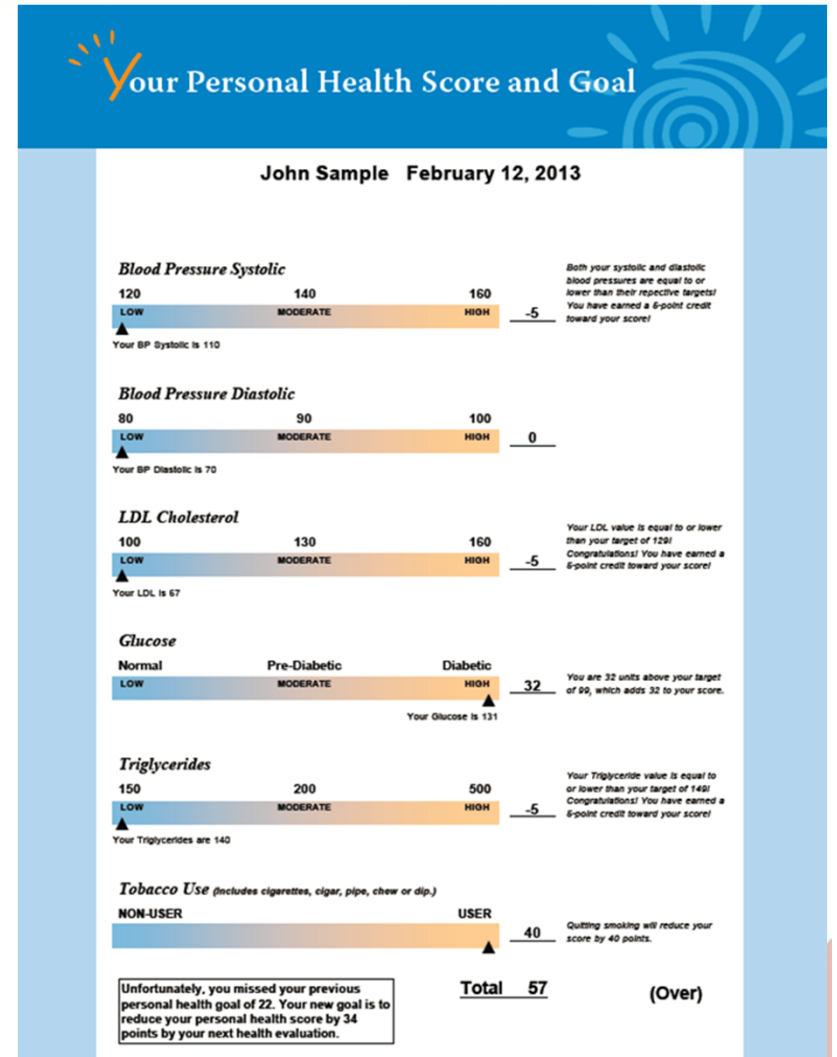
*Excise tax projections had COTA reaching a \$358,000 estimated tax liability in 2018*



## Biometric Screening

- 38-panel Biometric Screening
  - A1C Testing
- Outcomes-Based
- Spouses eligible
- Significant Premium Incentives
- Free 6-month re-check
- Fax results to personal provider

*70% participation in the first year*





## Building Trust

- Insurance Task Force
  - Union representatives
  - Members of the HR team
  - Insurance Carrier
  - Benefits Consultant
- Rebranded Wellness Program
- Wellness Ambassadors
- Wellness Champions

*75% of COTA's workforce is comprised of represented employees*

*60% of COTA's total workforce performs completely sedentary work as bus operators*

## Meet our Ambassadors

It is the mission of the On the Road to Wellness Program to foster an environment that promotes health and wellness for employees and their families through education and initiatives that:

- Encourage healthy lifestyle choices;
- Increase awareness of factors and resources contributing to well-being;
- Inspire and empower individuals to take responsibility for their own health; and
- Develop a positive workplace culture that is focused on celebrating and improving the quality of life for all employees.



**William Bowie** is a Bus Operator. He defines wellness as, "having the right mindset to eating right and working out to achieve your goals." Being on the wellness committee is important to him because of all the information and knowledge that is given in the meetings. To practice wellness, he reads and looks for all the possible information he can find on nutrition.



**Thomas Buschur** is a Senior Network Engineer. His view on wellness is about being aware of things that affect you positively and negatively and choosing to make the positive choices. He says, "People tend to get down on themselves if they are not able to get results from working out as quickly as they would like, but things take time and building up strength and endurance will not happen overnight. Every work out is a step in the right direction, and though you may not notice it immediately, the change is happening."



**Lindsay Ford-Ellis** is an Associate Legal Counsel. To her wellness is about happiness, both physically and mentally. She says, "I think wellness programs are important to overall happiness. Life is so much better when you feel better." She admits to having a sweet tooth, so to limit the amount of processed sugar she consumes, she allows herself to have one sweet item a day. She thinks working out should be fun, and since she hates to run, she does other great cardio workouts like Zumba and spinning.



**Holly Hill** is an HR Generalist, who believes wellness encompasses much more than only being physically fit; it involves being mentally, financially, emotionally and socially sound. Holly thinks wellness programs are important to COTA because they provide activities aimed at creating a healthier workforce. She says, "Without these programs we might have to replace employees who are unable to work due to irreversible health and wellness issues." Holly started walking in the evenings with her neighbor and is a member of a fitness gym. She reminds herself to "think positive thoughts" because being in a good place mentally allows the other aspects of wellness to fall into place.



**Dorina Henning** is a HR Coordinator. Wellness to her is being physically, mentally and emotionally fit. She thinks there needs to be an organized approach to wellness in order to affect the necessary changes and to get more employees on board. She tries to make sure to eat fruits and veggies every day and get to the gym at least 3 days a week. She recommends to "Get moving!"




**Christina Melton** is the Assistant to VP of Planning & Service Development. She joined the wellness committee to increase awareness and educate staff. To stay healthy she walks, fixes healthy meals and plays with her toddler for exercise. She recommends getting up and moving as much as you can because any kind of movement helps. Even hand delivering items to other floors instead of using inter-office mail is a good way to be active.



## Began wellness education & communication campaign

- Home mailings/Postcards
- Monthly newsletter
- Potty Talks
- Wellness Bulletin Boards
- TV Monitors
- Emails
- Intranet
- Paycheck stuffers
- Posters/Flyers
- Weekly newsletter
- Variety of home mailings



**July is UV Safety Month.**

### Slip! Slop! Slap! Wrap!

**Protect Your Skin from UV Rays.**

<b>Slip on a shirt</b>	<ul style="list-style-type: none"><li>• Wear clothing to protect your skin. Many companies are now making clothing that's lightweight, comfortable and protects against UV exposure even when wet. Look for a label listing the UV protection factor.</li></ul>
<b>Slop on sunscreen</b>	<ul style="list-style-type: none"><li>• Use sunscreen. However, even with proper use, some UV rays still get through. Consider sunscreen as one part of your skin cancer protection plan. Select sunscreens that protect against both UVA and UVB rays with a SPF of 30 or higher.</li></ul>
<b>Slap on a hat</b>	<ul style="list-style-type: none"><li>• A hat with a brim of 2 to 3 inches protects areas that are often exposed to intense sun: eyes, ears, forehead, nose and scalp.</li></ul>
<b>Wrap on sunglasses</b>	<ul style="list-style-type: none"><li>• UV-blocking sunglasses are important for protecting the delicate skin around the eyes, as well as the eyes themselves. Labels that say "UV absorption up to 400 nm" or "Meets ANSI UV Requirements" mean the glasses block at least 99% of UV rays.</li></ul>

**Potty Talk**  
July 2017

## Wellness Education

- Annual Safety & Wellness fair
- Annual Benefits fair
- Dietary guidelines for business meetings
- Benefits of Eating Away from Your Desk
- Sleep for Success
- Maintain Not Gain

*Increased wellness fair participation and engagement with a Passport card for prizes, including Fitbits!*



COTA has developed the following guidelines to demonstrate our commitment to creating a healthy work environment. We can promote better health, help reduce risks for chronic diseases, and show support for leading healthier lives by offering healthy food options at meetings and events.

### General Guidelines:

- Serve appropriate portion and serving sizes
- Choose foods that are low in saturated and trans fats
- Provide whole grain products & limit refined grain products
- Offer fresh fruits and vegetables
- Offer baked, roasted, broiled or grilled meats and fish
- Avoid foods with added salt or sugar
- Provide nutrition labels when available
- Beverages – Water, flavored water with no added sugar, 100% fruit or vegetable juice, skim or 1% milk, unsweetened tea or coffee

### Options:

#### BREAKFAST

- Non-fat or Greek yogurt
- Fresh fruit
- Low-fat granola bars
- Whole grain mini muffins/English muffins
- Whole grain Bagels (cut in half) or Toast
- Low-fat cream cheese, peanut butter, jam, jelly or cheese
- Turkey sausage or bacon

#### LUNCH/DINNER

- Sandwiches – whole grain breads or wraps, lean meats, low-fat cheese and low-fat condiments

- Lean meats or fish
- Salad – low-fat or fat-free dressing
- Vegetarian entree
- Broth based and low sodium soups
- Steamed or fresh vegetables – no butter or cream sauces
- Fresh Fruit
- Whole grain rolls
- Baked sweet or regular potatoes with low-fat toppings
- Baked chips or pretzels
- Low-fat desserts – fresh fruit with low-fat yogurt dip, low-fat ice cream or frozen yogurt, sherbet or sorbet, angel food cake with fruit topping

#### SNACKS

- Low-fat cheese
- Fresh fruit and vegetables
- Popcorn – light or no butter & salt
- Whole grain crackers or pretzels
- Dried fruit
- Hummus
- Lightly salted or unsalted nuts
- Low-fat granola bars
- Baked chips and salsa
- Angel food cake with fruit topping

# SEPTEMBER BIOMETRIC BOOTCAMP

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1	2
	<p>Get ready for your biometric screening by participating in September's Biometric Bootcamp! Follow the calendar and make it your goal to complete each daily task. Your everyday choices add up to make major impact on your health and wellness!</p>					Find a motivational quote and post in a special spot	Clean out your fridge
	3	4	5	6	7	8	9
	Meal prep a couple meals and snacks for the week	Drink at least 8 cups of water	Meet your onsite health coach	Track your food intake for a day	Park further away than normal	Take a 10-minute walk	Practice Meditation
	10	11	12	13	14	15	16
	Try a new healthy recipe	Do exercises during TV commercial breaks	Try a new fruit or vegetable	Do a 15-minute workout	Have a healthy snack	Weigh yourself	Look at your food labels
	17	18	19	20	21	22	23
	Do a hobby that brings you joy	Pay attention to portion size	Cut caffeine for a day	Meet your onsite fitness coach OR spend time stretching	Meet your onsite fitness coach OR walk during your breaks	Take the stairs	Get 8 hours of sleep
	24	25	26	27	28	29	30
	Eat a healthy breakfast	Fresh Fruit Monday & Meet your onsite dietitian	Meet your onsite dietitian OR Pack a healthy lunch	Do 10 minutes of strength training	Skip the soda	Make a Biometric Screening Appointment	Continue your healthy choices!

## On-Site Wellness Resources

- Fitness Facilities
- Dietitian
- Health Coaches
- Fitness Coaches
- Financial Wellness Lunch & Learns
- Fruit Mondays
- Flu Shots
- Mammograms & PSAs
- Musculoskeletal Assessments
- Walking Paths



## Wellness Resources

- Discounted Weight Watchers
- Fitness/Wellness reimbursement
- Telephonic health coaching
- DM Programs
- CoGo Bike Share Discount
- Resistance bands
- Standing Desks
- COTA Cookbook

## RESISTANCE BAND EXERCISES

One resistance band is being provided to all COTA employees courtesy of Medical Mutual of Ohio. Resistance bands are a great tool for exercise at home or packing up to take with you during the day for use when you are able to take a quick workout break, even if it is only 10 minutes. Remember to always consult your physician before beginning any exercise program. Below are a few examples of some resistance band exercises. Work up to approximately 3 sets of 10-15 repetitions of each exercise.

**Triceps Extensions** – Hold the band with your right hand above your head with the elbow bent and pulled in towards your head. Grab the other end of the band behind your back with the left hand until you feel some tension. Extend the right arm straight up then release bending the elbow back to the starting position. Repeat with the other arm. Please note this could be performed in a seated or standing position.



**Shoulder Pull downs** –

**Option 1** – Hold the band with both hands straight over your head. Pull both arms down to the side behind your head, and then return arms straight up. Repeat. Please note this could be performed in a seated or standing position.



**Option 2** – Hold the band with both hands straight over your head. Bring the right arm straight down to your side and back up. Repeat with the other arm. Please note this could be performed in a seated or standing position.



**Leg Extension** – With both hands and knees on the ground, place the band around feet and extend right leg straight up and back. Repeat with the left leg.





## Online Portal/Activities

- Health Assessment
- Healthy Weight Loss Competition
- YMCA Corporate Challenge
- Basketball League
- Challenges
  - Steps
  - Hydration
  - Healthy Lunchbox
  - Locomotion
- Preventive Exams
- Participation in Charity Drives
- Online Workshops

## Introducing **NEW** incentives and prizes for wellness!



COTA offers many opportunities to help you improve well-being, such as an on-site dietitian, fitness and health coaching, and more. To encourage you to stay On the Road to Wellness, we're excited to introduce a new way to track your wellness participation and earn rewards.

All **full-time** employees, regardless if you participate in the biometric screening or have COTA's health insurance, are eligible to participate.

You can now earn even more **incentives and prizes** when you complete wellness activities and track them on the wellness portal.

- Login at [www.myinteractivehealth.com](http://www.myinteractivehealth.com) to learn more about the ways to earn points
  - *First time users register with sponsor code ZNDEM*
- Track your participation at [www.myinteractivehealth.com](http://www.myinteractivehealth.com) now through December 8, 2017
- Earn a **\$50 gift card** (800 points) and a **FitBit** (1,500 points)!

### Here's how you can earn points:

Healthy Activities	Points
Complete Treasure Hunt Quiz	25
Complete your Health Assessment	25
Complete your Preventive Exam	50
Complete Interactive Health Team Challenge*	50
Complete YMCA Corporate Challenge	100
Complete Interactive Health Online Workshop	25
Have Interactive Health Fax Your 2017 Biometric Results to Your Physician	50
Complete Interactive Health 6-Month Re-check	100
Complete Local Activities (UNCF 5k, local race, on-site fitness center use, flu shot, lunch and learns, charity drives, and more!)	50
Attend COTA's Benefit Fair	100
Visit COTA's Dietitian	100
Visit COTA's Health Coach	100
Complete Medical Mutual Disease Management Program	200

**Unable to participate in activities with \* on the Action Plan to meet your goal?**  
Review your Personal Health Action Plan (PHAP) to see all of the ways that you can earn points towards your incentive. If you are unable to meet your health goals or participate in activities with \* above, you may qualify for an opportunity to earn the same incentive through an alternative course of action. Please contact Interactive Health no later than 4 weeks prior to November 10, 2017 at (800) 840-6100 or at [rasrequest@interactivehealthinc.com](mailto:rasrequest@interactivehealthinc.com) to request a reasonable alternative standard to qualify for the incentive.

### There's more to the wellness portal than just tracking your points:

- Track your mood, cardio, steps, food, water and sleep using the free online logs
- Call an IH health coach anytime at 800-840-6100, or use the chat function on the portal to connect instantly and confidentially
- Complete an online workshop to learn more about a specific wellness topic

*Interactive Health is a HIPAA compliant company, and no personal identifying health information is ever made available to anyone at COTA.*

### Questions?

Contact a Wellness Ambassador or Stephanie Pulliam at 614-275-5848 or e-mail [PulliamSL@cota.com](mailto:PulliamSL@cota.com).





*in 2016*

**WHERE WE ARE NOW...**



## 2015 Negotiations

- Base employee premium contributions are now 25%
  - Incentives available to pay as little as 8%
- Significant health insurance plan design changes
  - Deductible tripled
  - Out-of-pocket maximum doubled
  - Co-insurance
  - Co-payments
  - Specialty prescription tier

*Premium incentives in 2017 are almost \$4,200 annually*

*Excise tax projections are now at \$40,179 for 2020*

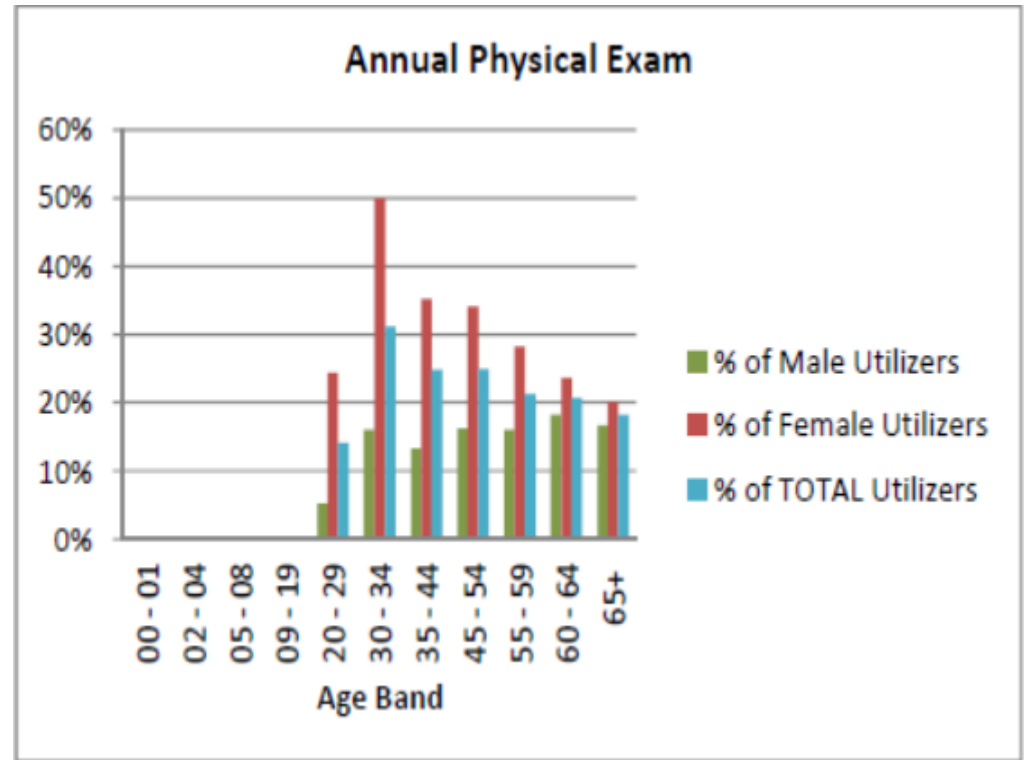


# MEASURING SUCCESS-CLAIMS



## Health Insurance

- 2016 Premiums - 8.8% decrease in premiums
  - Expected 2.45% decrease
  - Loss Ratio down to 72.2%
- Preventive Services Utilization – don't forget about dental & vision
- High Claimants – disease categories
- DM Enrollment



# MEASURING SUCCESS-CLAIMS



## Health Insurance

- Paid Claims Per Member Per Month
  - Biometric Participants - \$484.57
  - Non Participants - \$578.13
- New Members – Claim trend from last renewal to current renewal
  - Enrolled 2+ Years - 0.2%
  - Less than 2 Years – 29.2%
- High Claimants
  - Catastrophic claims over \$50,000 – 25.6% one year trend
  - Non-catastrophic claims – -7.0% one year trend



## Achievements

- Biometric Wellness Program
  - Reports of significant weight loss & smoking cessation
  - Decrease in most health indicators
  - Life-saving identifications
  - Positive Change:
    - 85% in the healthy range maintained
    - 43% at moderate risk improved to healthy
    - 41% at high risk improved to healthy or moderate

*Biometric program participation is now at 81%*

### On the Road to Wellness

#### Employees Enrolled in Medical Plan

Employees and spouses who are enrolled in the COTA medical plan are eligible to participate in the biometric screening portion of the wellness program. For 2016, the health premiums of first-time participants and participants who meet all of their health goals are reduced to 8%. This means that COTA covers 92% of the participant's premium.

If participants meet some but not all of their health goals, their premiums are reduced to 12%. If they do not meet their goals due to the presence of nicotine at the time of screening, their premiums are reduced to 20% and COTA covers 80% of the participant's premium.

Employees who do not participate pay their full 25% share of their health premiums.

#### Employees Not Enrolled in Medical Plan

Employees who are not enrolled in COTA's medical plan receive a \$400 monthly opt-out payment and are still eligible to participate in all aspects of the wellness program. However, these participants pay 50% of the biometric screening cost and COTA pays the remaining 50%.

#### The Numbers: Counting Success

As demonstrated by the following 2015 results, participants continue to show improved health, and more than 90% reported experiencing personal value from the program.

*Health Improvements for COTA Wellness Program Participants (2014-2015)*

Condition	Percentage Improvement
Blood pressure	97%
Cholesterol	70%
Glucose	83%
Triglycerides	68%
Tobacco use	42%

#### New Conditions Discovered

The value of the wellness program is also evident in the discovery of new conditions. In 2015 alone:

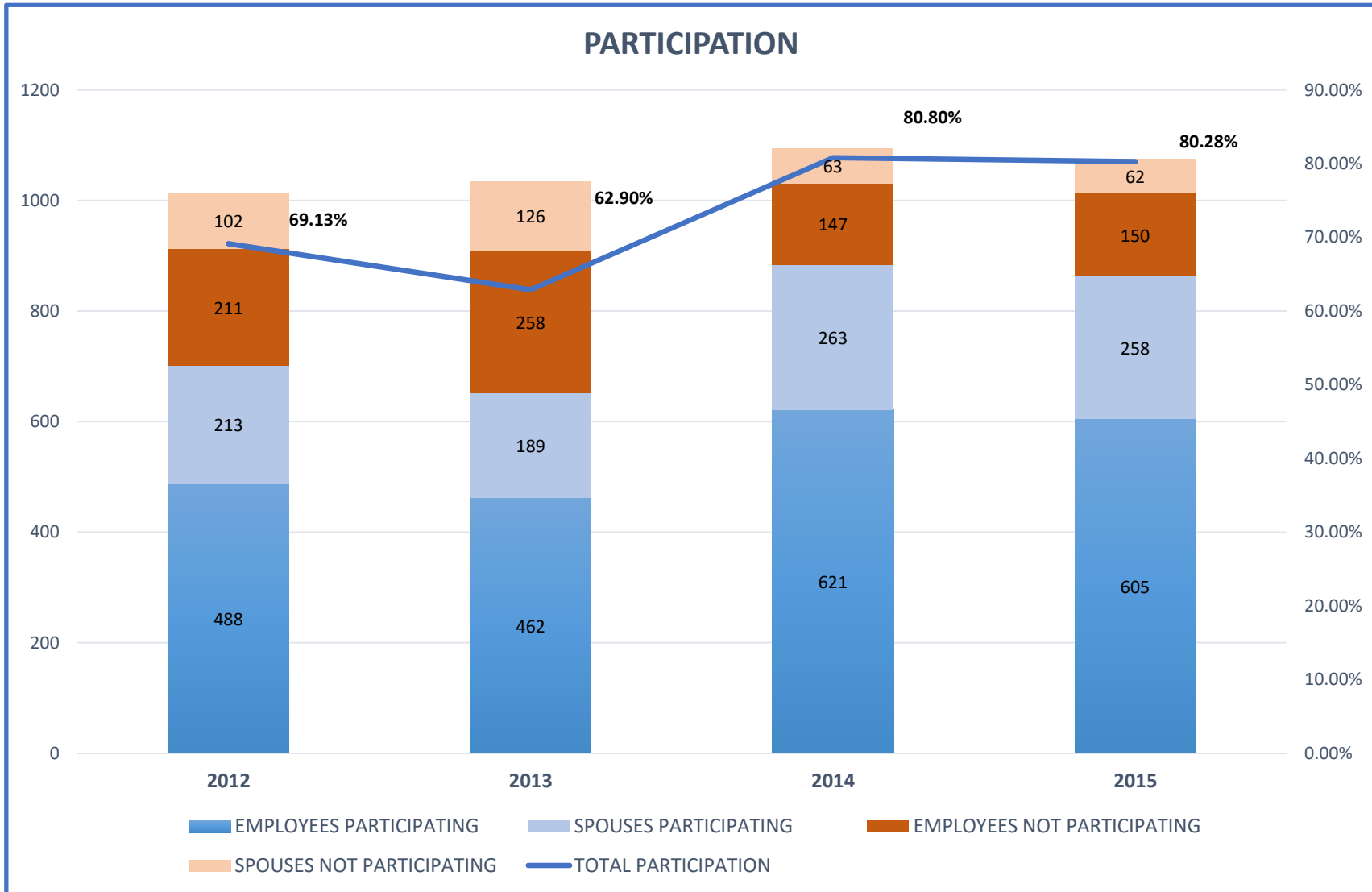
- Moderate risk conditions were discovered in 94 participants.
- Critical risk conditions were discovered in 23 participants. (These participants were contacted within 1-2 business days following testing.)
- Early stage cancer was detected in 25 participants.

#### Migration of Health Risk

Migration of health risk over time is another important measure of a wellness program's success.

More than 1,500 COTA participants who were screened in two consecutive years over three time periods (2012-2013, 2013-2014, 2014-2015) were assigned risk levels of *healthy*, *moderate* and *high* based on their personal health scores.

# MEASURING SUCCESS-PARTICIPATION



# MEASURING SUCCESS-BIOMETRIC OUTCOMES



## IHI Improvements

	Regressed	Same	Improved	Total *
Blood Pressure	1 (3%)	1 (3%)	32 (94%)	34
LDL Cholesterol	43 (27%)	21 (13%)	95 (60%)	159
Glucose	66 (30%)	30 (14%)	126 (57%)	222
Triglycerides	20 (11%)	35 (20%)	121 (69%)	176
Smoking	0 (0%)	51 (51%)	49 (49%)	100

\* Total number of members asked to improve based on their last health evaluation

## Newly Discovered Conditions

## At Risk

Anemia	24	4
Blood Pressure	40	4
High Cholesterol	120	25
Diabetes	45	44
Kidney Condition	36	12
Liver Condition	60	4
Thyroid Condition	3	1
Metabolic Syndrome*	321	-

# MEASURING SUCCESS-BIOMETRIC OUTCOMES



INTERESTING INSIGHTS	REPEAT Members	NEW Members	Aggregate
Average BMI	31.6	32.0	31.6
Percentage of Tobacco Users	7.4%	18.8%	8.4%
Percentage of Problem Drinking	0.5%	1.3%	0.5%
Percentage of Members Referred to Physician	66.0%	60.0%	65.5%
Members at risk for Heart Attack over next 10 yrs	24.1%	15.0%	23.3%
Percentage with Metabolic Syndrome	35.3%	30.0%	34.9%
INTERACTIVE HEALTH INDEX (IHI)	REPEAT Members	NEW Members	Aggregate
Average IHI Score	4	6	5
Percentage in High Risk	19%	26%	19%
Percentage in Moderate Risk	18%	11%	18%
Percentage in Low Risk	63%	63%	63%

# MEASURING SUCCESS-BIOMETRIC OUTCOMES



## Health Score Migration

change over 1 year period

- Percentage %
- Number #

Ending Health Score	Starting Health Score		
	Healthy	Moderate Risk	High Risk
Healthy	85%	38%	20%
Moderate Risk	11%	40%	19%
High Risk	4%	23%	61%

Member Totals by Risk Level

865	248	216
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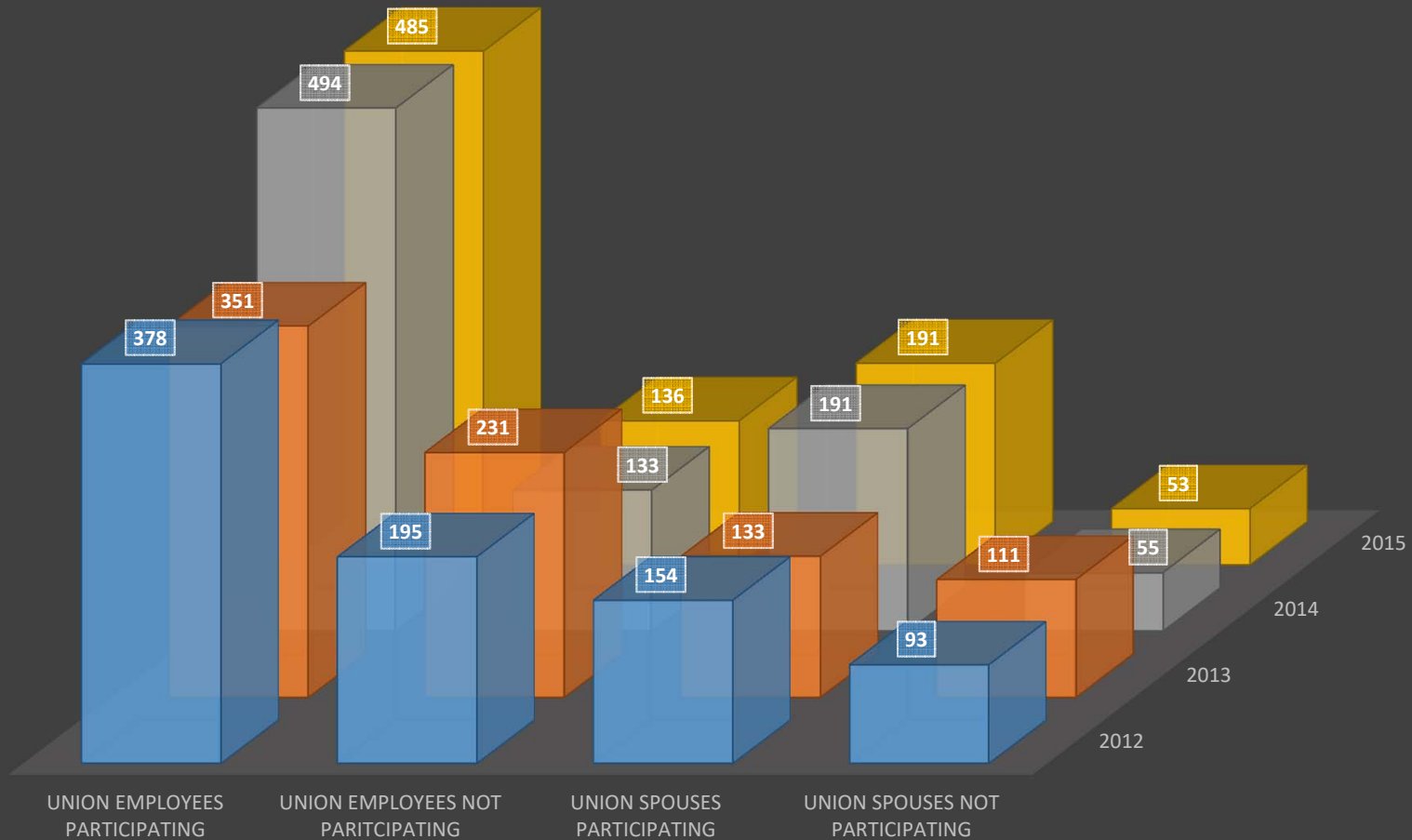


# MEASURING SUCCESS-PARTICIPATION



## UNION PARTICIPATION

■ 2012 ■ 2013 ■ 2014 ■ 2015

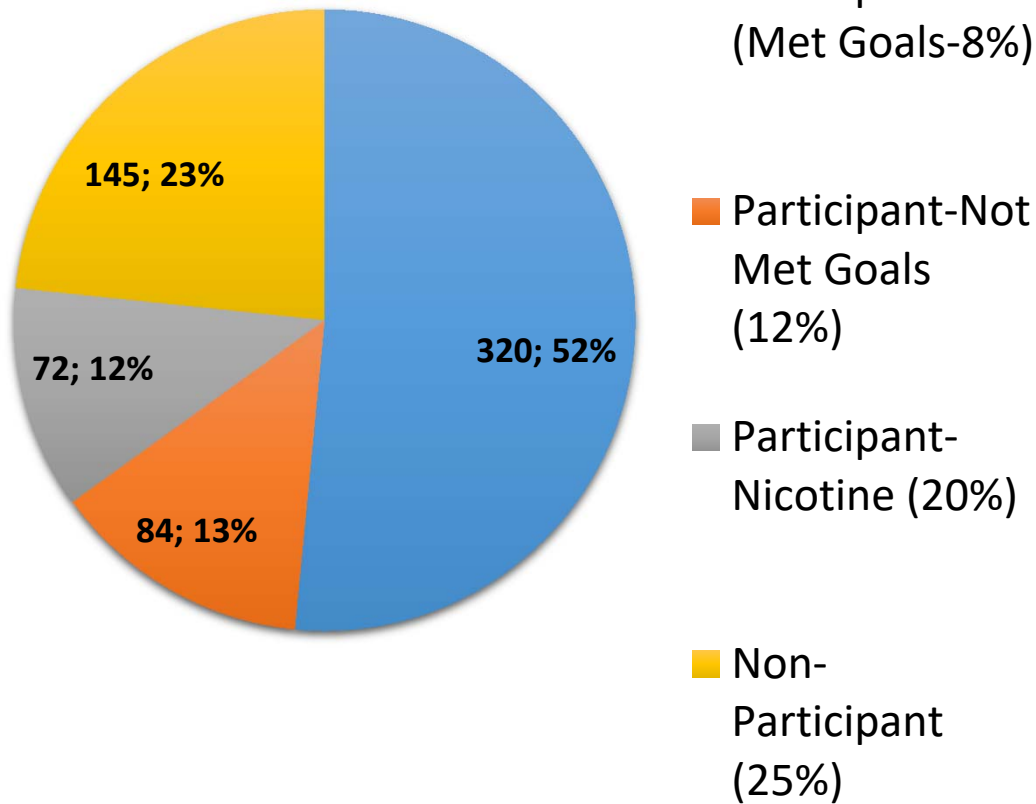




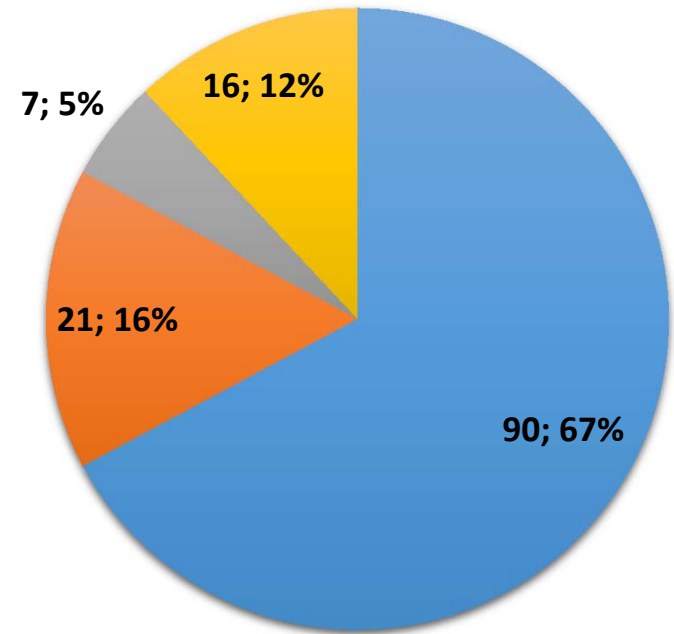
# MEASURING SUCCESS-PARTICIPATION



## UNION PREMIUMS



## ADMIN PREMIUMS

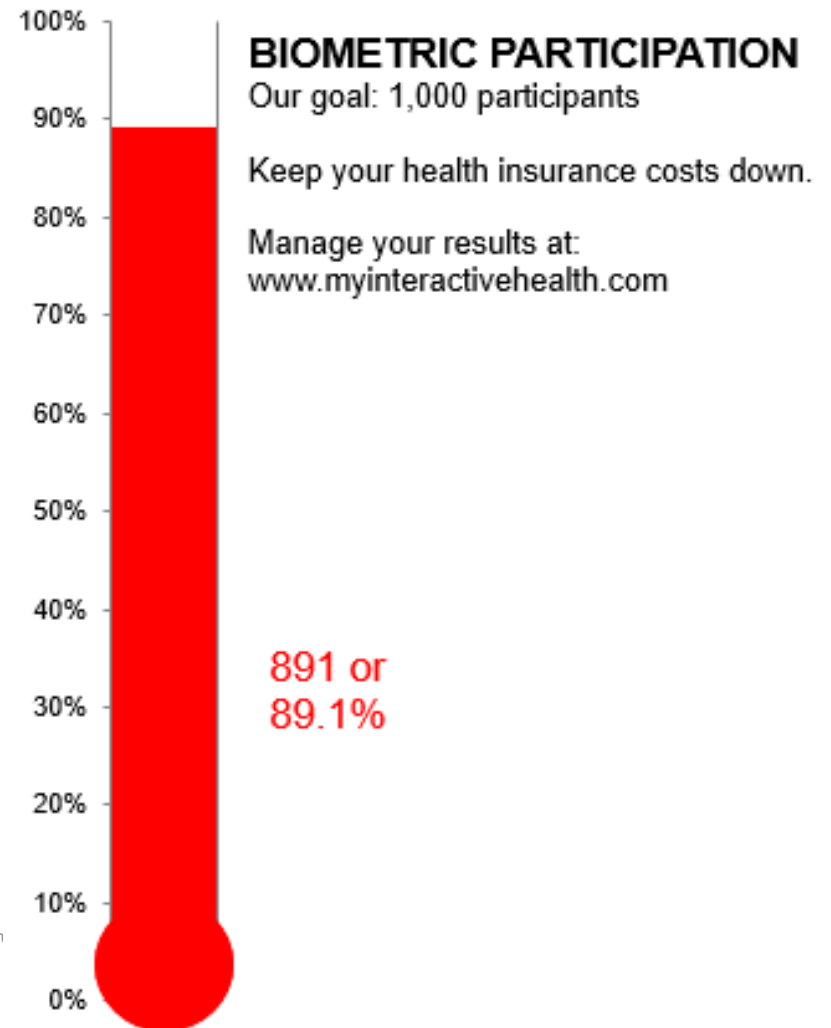
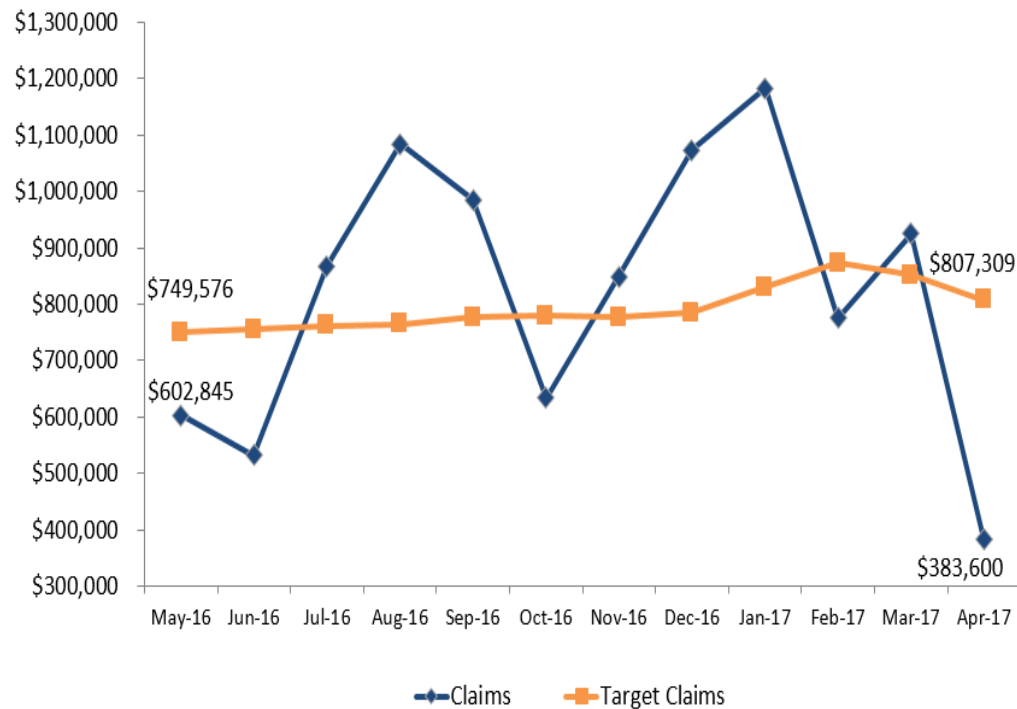


# MEASUREMENT



## Communication

- Claims graph in newsletter
- Biometric thermometer



## Achievements

- Columbus CEO Magazine 2015 HR Excellence Award for HR Innovation
- Columbus CEO Magazine 2017 HR Excellence Award for Team Excellence
- Columbus Business First 2014 & 2016 & 2017 Healthiest Employer Awards
- OHPELRA & NPELRA 2015 & 2016 Pacesetter Awards



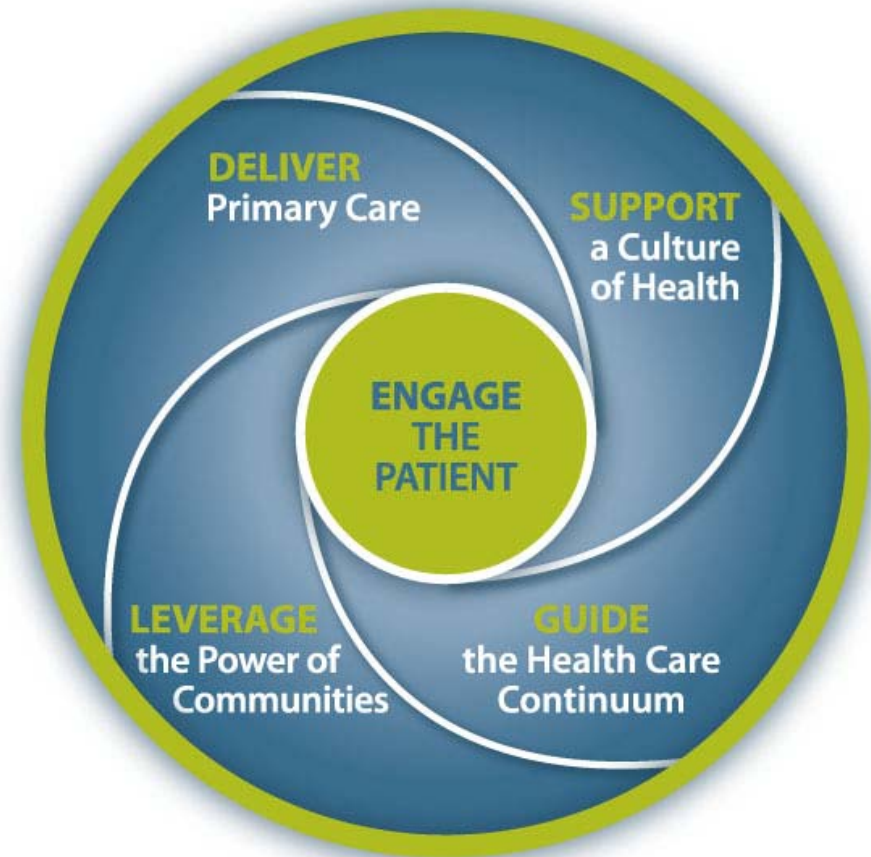


*beyond 2016*

# WHERE WE ARE GOING...

## Continue improvements

- Introduce more wellness activities
- Consider self-funding for health insurance
- Evaluate feasibility of an on-site clinic
  - Dependents eligible
  - Wellness Center
  - Limited occupational health services
- Negotiations this year



## Questions?

Kristen Treadway

Vice President of Human Resources & Labor Relations

[treadwaykm@cota.com](mailto:treadwaykm@cota.com)

614-308-4377

Stephanie Pulliam

Compensation & Benefits Manager

[pulliamsl@cota.com](mailto:pulliamsl@cota.com)

614-275-5848





*Interactive*  
HEALTH

COTA

On the Road to Wellness

2016

## COTA: On the Road to Wellness

The Central Ohio Transit Authority (COTA) is the regional public sector agency providing mass transportation to residents throughout central Ohio. With a service area consisting of more than a million residents, COTA provides nearly 20 million passenger trips each year.

COTA is committed to excellence in serving its stakeholders, customers, employees and taxpayers; delivering quality transportation services; conducting business courteously, safely, ethically and reliably; and demonstrating leadership that is fiscally responsible and environmentally conscientious.

### Bringing Everyone Together

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Many of COTA's employees are represented by the Transport Workers Union (TWU), Local 208. In 2012, a new contract was successfully bargained and approved following a 3-day labor strike. However, between the favorable health benefits included in this contract, along with economic factors influencing the healthcare industry, the benefits ultimately led to hefty health plan premium increases for both COTA and its employees.

In the wake of the strike and the contentious relations that resulted, along with approximately 80% of its workforce largely sedentary, COTA leadership implemented a comprehensive wellness program. The strategy, vision and goal were to defray rising healthcare costs and build a positive corporate culture. However, as a public entity, significant work needed to be done with a limited budget.

Employees were distrustful of management and skeptical about potential advantages a wellness program would deliver. While this situation is not unique in a union environment, it was certainly heightened with the struggling relationships already being experienced.

COTA recognized the scale of such an endeavor and brought together a project team. It consisted of two groups: one, an Insurance Task Force consisting of COTA HR representatives, union members, the health insurance carrier and benefits consultant; and two, a Wellness Committee representing all departments of the COTA organization. Combined, these two groups represented all the constituencies with stakes in the wellness program.

Based on the recommendation of Kristen Treadway, COTA's Vice President of Human Resources and Labor Relations, Interactive Health was selected as the partner of choice. Kristen worked with Interactive Health at her former municipality and was confident Interactive Health would jump-start COTA's program and deliver healthy results.

### Setting Out "On the Road to Wellness"

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The Wellness Committee aptly branded the COTA program "On The Road to Wellness." Rebuilding a corporate culture based on employee confidence, job satisfaction and security was integral to long-term success. With a message that communicates "we care about the health and well-being of you and your family," management planted the seeds of the new culture. Interactive Health partnered with COTA to develop strategies that ensured their



challenges would not be barriers to the wellness program's success.

### Challenge: Confidentiality Concerns

Employees were concerned that COTA would use their biometric information against them and/or share it with the insurance company.

Information sessions were held prior to beginning the biometric screenings in order to help alleviate concerns and answer any questions. Heavy communication regarding confidentiality, and handouts, such as HIPAA statements, were provided before and during the annual screenings. As Ambassadors, the Task Force and Wellness Committee members also helped break down barriers by openly discussing confidentiality concerns and the health screening process with their co-workers.

### Challenge: Communication

The majority of employees lacked email addresses and access to computers. In addition, they worked outside typical office settings.

To address this challenge, the team created alternate methods of communication, including a monthly wellness newsletter; a weekly COTA newsletter with wellness announcements; TV monitors posted relevant information at each location; posters and flyers in day rooms, restrooms and other areas; home mailings to employees and spouses; payroll stuffers; and engaged union representatives helped distribute flyers to spread the word.

### Challenge: Multiple Locations and Shifts

COTA employees work from numerous locations and on diverse shifts, creating challenges for screening scheduling.

In response, screening locations were made available on Saturdays at off-site alternate locations. Onsite scheduling opportunities were offered on multiple days, at multiple times and at various locations.

### Challenge: Time Pressures

COTA employees are under intense pressure to adhere to strict scheduling.

To lessen this challenge, increased numbers of phlebotomists were made available, sometimes "on the fly" to get participants in and out quickly. Walk-in accommodations were made for employees on call or without set schedules.

## The Shift to a Culture of Wellness

"We were really trying to change the culture," says Kristen Treadway, Vice President of Human Resources and Labor Relations. "We began looking at the factors causing the health insurance plan to be unsustainable. The team put a new focus on the health plan design, as well as current and future challenges associated with the plan."

The first initiative launched was a 34-panel biometric screening program offered to eligible employees and spouses. "The program goes beyond what a typical program would," Stephanie Pulliam, Compensation and Benefits Manager, says. "Using biometric and not BMI, which can vary for a lot of people, means we can get a much clearer view of areas people need to work on. We are attempting to do as much as we can, as far as education, tools and resources to help people maintain and improve healthy lifestyles."

## Setting the Stage: Awareness of Participants' Health Status

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The company's first major undertaking was to raise employees' awareness of their health status and then to provide the resources to achieve personal wellness goals. Helping participants "understand their numbers"—that is, the results of a 34-panel biometric screening offered by Interactive Health—set the stage. Eligible participants received communications through multi-media avenues encouraging them to register online or over the telephone.

The screenings evaluated participants' risk for cardiovascular disease, diabetes, kidney disease, liver disease, anemia risks and other serious conditions. Qualified healthcare professionals from Interactive Health promptly followed up with all participants identified with critical conditions. In addition, participants could have their results communicated to their personal physicians. This step encouraged meetings between participants and physicians to address negative results and monitor conditions on an ongoing basis.

## Creativity and Innovation

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The Task Force and Wellness Committee developed components not widely available in the Central Ohio region. Examples include:

- Telephonic health coaching
- Educational webinars
- Online meal and exercise planners
- Annual health and wellness fairs
- COTA basketball league
- Team walking competitions

- Individual healthy weight loss competitions
- Monthly onsite dietitian visits
- Educational grocery shopping trips
- Onsite fitness centers
- Reimbursement for fitness or wellness related memberships
- Distribution of resistance bands for quick workout breaks that may be accomplished even while at a layover point on a bus

Participants were given access to a robust, customized website that provided ease of scheduling and real-time access to results, health programs, interactive tools and calculators, health webinars, a health library and other resources to help participants achieve their health goals.

## Incentives Encourage Participation

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Along with improved health and quality of life, the wellness program offers COTA employees and their spouses generous financial incentives through reduced health benefit premiums. This strategy has assisted COTA in obtaining over 80% participation in the 2015 health evaluations.

The base premium cost for employees and enrolled spouses is 25% of COTA's total premium cost. Reduced premium amounts depend on whether participants are enrolled in the COTA medical plan and meet their health goals. Employees with family coverage have the opportunity to save as much as \$3,978.48 in 2016 when health goals are achieved.

## Employees Enrolled in Medical Plan

Employees and spouses who are enrolled in the COTA medical plan are eligible to participate in the biometric screening portion of the wellness program. For 2016, the health premiums of first-time participants and participants who meet all of their health goals are reduced to 8%. This means that COTA covers 92% of the participant's premium.

If participants meet some but not all of their health goals, their premiums are reduced to 12%. If they do not meet their goals due to the presence of nicotine at the time of screening, their premiums are reduced to 20% and COTA covers 80% of the participant's premium.

Employees who do not participate pay their full 25% share of their health premiums.

## Employees Not Enrolled in Medical Plan

Employees who are not enrolled in COTA's medical plan receive a \$400 monthly opt-out payment and are still eligible to participate in all aspects of the wellness program. However, these participants pay 50% of the biometric screening cost and COTA pays the remaining 50%.

## The Numbers: Counting Success

As demonstrated by the following 2015 results, participants continue to show improved health, and more than 90% reported experiencing personal value from the program.

## Health Improvements for COTA Wellness Program Participants (2014-2015)

Condition	Percentage Improvement
Blood pressure	97%
Cholesterol	70%
Glucose	63%
Triglycerides	68%
Tobacco use	42%

## New Conditions Discovered

The value of the wellness program is also evident in the discovery of new conditions. In 2015 alone:

- Moderate risk conditions were discovered in 94 participants.
- Critical risk conditions were discovered in 23 participants. (These participants were contacted within 1-2 business days following testing.)
- Early stage cancer was detected in 25 participants.

## Migration of Health Risk

Migration of health risk over time is another important measure of a wellness program's success.

More than 1,500 COTA participants who were screened in two consecutive years over three time periods (2012-2013, 2013-2014, 2014-2015) were assigned risk levels of *healthy*, *moderate* and *high* based on their personal health scores.

The data revealed that positive change was seen among all risk levels:

- 85% of those in the healthy range remained healthy.
- 43% of participants at moderate risk improved to a healthy state.
- 41% of participants at high risk improved to a healthy or moderate risk state.

### Impact on Productivity and Medical Spend

Risk migration for core conditions which impact employee productivity and overall medical spend was also observed. The following chart depicts the rate at which participants with disease conditions in 2014 migrated to healthy or in-control states in 2015. Overall, these positive risk migrations produced corporate cost avoidance of approximately **\$315,000** in 2015.

#### Condition-Specific Risk Migration (2014-2015)

Condition	Percentage of Participants Migrating to a Healthier State
Out-of-control diabetes	40%
Pre-diabetes	71%
Metabolic syndrome	41%
Hypertension	97%
Anemia	47%

After four years in the program, improved employee health is now impacting COTA's bottom line and the benefits are being shared company wide. For 2016, COTA achieved an 8.8% decrease in its fully-

insured medical plan premiums, which netted approximately **\$1 million** in savings. These savings are shared with employees through a decrease in premium contributions.

## The Bottom Line: Value and Empowerment

While improved spending trends derived from the COTA wellness program are substantial, the value extends well beyond saving costs...to saving lives. The program promotes relationships between participants who do not have or do not visit a primary care physician. The comprehensive screenings cast a wider net to identify undiagnosed conditions not detected in more limited panels. The program helps participants understand their numbers and tracks progress in attaining their annual personal health goals.

### Reasons for Success

COTA attributes several key strategies to their wellness program success:

- Taking a strategic approach that began with awareness and has transitioned to a goal-based program
- Integrating benefit and plan design, union contracts and wellness into one package
- Obtaining executive level and union support
- Focusing on creating a corporate culture of wellness
- Being creative in finding ways to address specific challenges unique to COTA
- Customizing communications
- Establishing a generous incentive to drive participation

- Partnering with the health plan to bill the biometric screening as a preventive claim

### Employee Impact

In 2015, a COTA employee reported that her husband's biometric screening revealed potential heart disease. Interactive Health outreached and engaged the participant immediately. A stress test performed by the primary care physician showed the need for the insertion of a heart catheter and a stent. The screening, the couple believes, saved the husband's life.

Data from the first year of the wellness program revealed 25 participants potentially with cancer. Data from 2015 reported only two participants with the possibility of early stage cancer. One of these participants reported that early intervention helped him successfully treat his cancer.

These kinds of human stories continue to generate excitement in COTA's wellness program. It has empowered employees and their spouses to adopt healthier habits, leading to true lifestyle changes and an overall healthier workforce.

### Evaluating Success and Investing in the Future

As COTA looks toward the future, progress will continue to be monitored. A feasibility study for an onsite health clinic was conducted in 2014, and COTA will continue to monitor its claims data for future development. In 2016, COTA has once again expanded its wellness program to include A1C testing for all participants identified as having an increased risk for diabetes, and expanded outreach will target approximately 35% of the COTA participants trending in the wrong direction.

Measurement of program success and employee impact indicates that COTA and

its employees will continue to reap the financial and health benefits of wellness. The program initiated four years ago now serves as a model for all companies to invest in employee wellness.

### COTA Honored for Wellness Program Success

#### HR Excellence Award – Innovation

In 2015, COTA was honored with the "HR Excellence Award—Innovation" by *Columbus CEO* magazine. The award was based on the successful implementation of COTA's wellness program aimed at changing the organization's culture, improving the health and wellness of employees and their families, introducing successful and popular employee wellness initiatives, and ultimately, containing costs.

#### Healthiest Employer of Central Ohio

The "2014 and 2016 Healthiest Employer of Central Ohio" award from *Columbus Business First* recognized COTA's commitment to create a healthier, more productive community of employees who understand the value of healthcare and are actively involved in managing their own health. In accepting this award, COTA committed to serving as a resource to other organizations whose aim is creating or improving corporate wellness initiatives.

#### Ohio Public Employer Labor Relations Association, and National Public Employer Labor Relations Association Pacesetter Awards

Stephanie Pulliam, Compensation and Benefits Manager, won these awards for her work and leadership with COTA's insurance and wellness program.