

Building Better Health: Physical Activity Challenge

Bipartisan Policy Center CEO Council on Health and Innovation

Physical Activity Challenge Employer Toolkit



This toolkit is designed to provide helpful information to employers that are considering participating in or are planning to participate in the Building Better Health: Physical Activity Challenge which is sponsored by the Bipartisan Policy Center CEO Council on Health and Innovation. The information provided covers specifics of participation in the Physical Activity Challenge, as well as best practices and key considerations when launching a physical activity challenge program and selecting a vendor to support a physical activity challenge.

Information contained in this toolkit was compiled with input from physical activity challenge vendors, employers, and benefit consultants specializing in health management so you can benefit from the collective experience of the group.

We hope you use this information to improve the health of your population and we look forward to seeing you in an upcoming physical activity challenge!

Section 1: Background	4
<i>The CEO Council on Health and Innovation and the Bipartisan Policy Center</i>	<i>4</i>
<i>The CEO Council Physical Activity Challenge</i>	<i>4</i>
<i>Benefits of Participation</i>	<i>5</i>
<i>Employer Requirements and Program Customization</i>	<i>5</i>
<i>Dates and Timing</i>	<i>6</i>
<i>Signing Up for the Challenge</i>	<i>6</i>
Section 2: The Business Case for Physical Activity	7
<i>Why Exercise?</i>	<i>7</i>
<i>Guidelines and Current State</i>	<i>7</i>
<i>Physical Activity is an Employer Issue</i>	<i>7</i>
<i>Investing in a Worksite Physical Activity Program</i>	<i>8</i>
Section 3: How to Participate in the CEO Challenge	9
<i>Requirements</i>	<i>9</i>
<i>Additional Information to Support Evaluation</i>	<i>9</i>
Section 4: Best Practices	11
<i>Design</i>	<i>11</i>
<i>Leadership Support and Involvement</i>	<i>11</i>
<i>Communications and Promotion</i>	<i>12</i>
<i>Tracking and Reporting</i>	<i>12</i>
<i>Incentives</i>	<i>13</i>
<i>Program Integration</i>	<i>13</i>
Section 5: Considerations When Selecting a Vendor	15
<i>Vendor Experience</i>	<i>15</i>
<i>Platform and Mobile Capabilities</i>	<i>15</i>
<i>Challenges</i>	<i>16</i>
<i>Communications</i>	<i>17</i>
<i>Tracking Devices and Integration</i>	<i>17</i>
<i>Engagement and Incentives</i>	<i>18</i>
<i>Data Security</i>	<i>18</i>
<i>Measurement and Reporting</i>	<i>19</i>
<i>Account Management</i>	<i>19</i>
<i>Fees and Performance Guarantees</i>	<i>20</i>
<i>Contracting Expectations</i>	<i>20</i>
Section 6: Frequently Asked Questions	21
Section 7: Sources	25

Section 1: Background

The CEO Council on Health and Innovation and the Bipartisan Policy Center

The Bipartisan Policy Center's (BPC) CEO Council on Health and Innovation (CEO Council) is comprised of chief executives of some of the nation's largest employers who are taking actions to improve the health and wellness of individuals and achieve higher quality, more cost-effective, patient-centered care. CEO Council members are adopting innovative strategies and inviting other employers to join them in their commitment to improve the health and wellness of individuals, the health of communities, and the health care system.

Members of the CEO Council on Health and Innovation include the CEOs of Aetna, Bank of America, Institute for Advanced Health and NantHealth, Johnson & Johnson, McKinsey & Company, The Coca-Cola Company, Verizon Communications, and Walgreen Co.

Senior human resources and strategy executives of each CEO Council member company are engaged in a work group designated to design and lead efforts associated with the *Building Better Health: Physical Activity Challenge*. Jim Huffman of Bank of America and Audrietta Izlar of Verizon serve as co-chairs of this effort.

A Health Care Advisory Board, made up of chief executives of organizations representing clinicians, consumers, and hospitals provide guidance to the CEO Council, along with Senate Majority Leaders Tom Daschle (D-SD) and Bill Frist (R-TN). BPC Health Innovation Initiative Director Janet Marchbroda serves as the Executive Director of the CEO Council.

For additional information about the CEO Council, please visit www.healthinnovationcouncil.org and for additional information about BPC, please visit www.bipartisanpolicy.org.

The CEO Council Physical Activity Challenge

As part of the commitment the CEO Council made in September 2014 when it released its initial report, [Building Better Health: Innovative Strategies from America's Business Leaders](#), the CEO Council is launching the *Building Better Health: Physical Activity Challenge* (Physical Activity Challenge). Through the Physical Activity Challenge, the CEO Council is committing to and inviting other employers to join them in raising awareness of the importance of physical activity, improving the health and wellbeing of their employees, and identifying strategies that will support successful implementation of physical activity programs by all American businesses.

Employers who agree to participate in the Physical Activity Challenge will invite their employees to enroll in a physical activity program which will consist of a minimum of 8 weeks of physical activity during which time employees will voluntarily track their steps and/or exercise levels.

Benefits of Participation

Physical inactivity has been identified by the World Health Organization as the fourth leading risk factor for global mortality, accounting for 6 percent of deaths globally.¹ Physical activity has been associated with numerous health benefits, including lowered risk of cardiovascular disease, metabolic syndrome, type 2 diabetes, and some cancers. It helps control weight, promotes stronger bones and muscles, improves mental health and mood, and can increase chances of living longer.²

Employers recognize that physical activity can have a positive impact on the health and wellbeing of employees and of the organization. According to a Towers Watson/National Business Group on Health survey, 73 percent of surveyed U.S. employers reported lack of physical activity is an issue in their workforce.³ Another recent U.S. study found that physically active adults have lower annual health care expenditures than insufficiently active adults, and overall, 11.1 percent of total health care expenditures are associated with inadequate physical activity.⁴

Employers who participate in the Physical Activity Challenge will benefit from sharing successful strategies and lessons learned with their peers to improve the success of physical activity programs within their own organizations. They will also contribute to and learn from a formal, independent evaluation that will identify effective strategies for driving higher levels of participation and sustainable behavior change. According to a Towers Watson/National Business Group on Health survey, lack of employee engagement was cited by 77 percent of employers as the biggest barrier to success of health and wellness programs.³

Employers participating in the Physical Activity Challenge will be publicly recognized for their leadership in promoting physical activity to improve health and wellbeing. Their involvement in and commitment to the Challenge will be highlighted through press releases, public events, a robust social media campaign, and earned media.

Employer Requirements and Program Customization

In an effort to encourage participation, Challenge requirements are minimal (see Section 3 for additional details). Employers who agree to participate in the Physical Activity Challenge will invite their employees to enroll in a physical activity program and commit to a minimum of 8 weeks of physical activity, during which time employees will track their steps and/or exercise via an employer-sponsored platform.

Employers can choose to invite their entire population or a subset of their population to participate. All Challenges must begin by no later than October 2015.

Participating employers will also share their general program design and both aggregate and average activity levels with an independent set of researchers led by Ron Goetzel, PhD at Johns Hopkins University, to contribute to the identification of strategies that will support successful engagement of employees in physical activity programs by employers across the U.S.

Employers are also encouraged to invite their employees to complete brief, voluntary surveys to assist with further evaluation by the Johns Hopkins team. These surveys include a pre-challenge survey and short follow-up surveys 8 weeks after completion of the Challenge and again 6 and 12 months after completion of the Challenge, to evaluate the impact of physical activity on health and wellbeing and to identify effective strategies for driving high levels of participation and sustainable behavior change. Key outcomes, best practices, and lessons learned will be disseminated following the Challenge.

Employers will have discretion to determine key aspects of the challenge, including:

- **Methods of tracking and reporting physical activity** – employers may choose to provide or even subsidize tracking devices for their employees, they may opt for a “bring your own device” approach where employees can use the device or Smartphone app of their choice, or employers can allow employees to manually track and self-report activity with a basic, low-cost pedometer.
- **Prizes and incentives** – incentives are not required to participate and should not be a barrier to entry. We discuss a number of low or no cost incentive options that have worked well for other employers in Section 4 of the Toolkit.
- **Vendor partners** – Employers are free to work with the vendor partner of their choice. Typical services provided by physical activity challenge vendors are designed to provide a turn-key offering and include communications and promotion, device fulfillment, web platform for tracking and data capture, incentive tracking, and reporting.

Dates and Timing

The Physical Activity Challenge will have rolling start dates from April 2015 through October 2015 based on employer readiness. Challenges must run for at least 8 weeks to support program evaluation; continued participation beyond the 8-week evaluation period will be at employer and employee discretion.

In December 2015 there will be a formal announcement including initial Challenge results (e.g., number of steps taken, number of pounds lost, and number of employees participating). Best practices and findings from the evaluation will be published in 2016.

Signing Up for the Challenge

Employers can sign up for the Physical Activity Challenge by contacting Janet Marchibroda, Executive Director of the CEO Council at jmarchibroda@bipartisanpolicy.org or by going to the CEO Council website: <http://www.healthinnovationcouncil.org/>.

Section 2: The Business Case for Physical Activity

Why Exercise?

As reported by the World Health Organization (WHO), physical inactivity has been identified as the fourth leading risk factor for global mortality, accounting for 6% of deaths globally. It is estimated to be a main cause for 21-25% of breast and colon cancers, 27% of diabetes, and approximately 30% of ischemic heart disease.¹ Not surprisingly, regular physical activity has been associated with numerous health benefits, including lowered risk of cardiovascular disease, metabolic syndrome, type 2 diabetes, and some cancers. It helps control weight, promotes stronger bones and muscles, improves mental health and mood, and can increase chances of living longer.² Even more encouraging is the amount of activity required to achieve these benefits: As Dr. Mike Evans explains in his popular YouTube clip [*23 and ½ hours: What is the single best thing we can do for our health*](#)⁵, we need less than 30 minutes a day to achieve health benefits.

Guidelines and Current State

Current *Physical Activity Guidelines for Americans* recommend that adults receive:

- At least 150 minutes/week of moderate-intensity *or* 75 minutes of vigorous-intensity aerobic physical activity *or* an equivalent combination, *and*
- Moderate or high-intensity muscle-strengthening activities involving all major muscle groups at least 2 days a week⁶

Yet, despite the very limited time commitment required to meet the recommended guidelines – a few 10 minute walking breaks a day would meet the guidelines – less than half (49.6%) of all adults meet the recommendations for aerobic physical activity and less than one in four (23.6%) adults meet the guidelines for muscle-strengthening activity.⁷

Physical Activity is an Employer Issue

With private employers providing health insurance coverage for an estimated 169 million Americans and benefit costs accounting for about a third of labor costs, employers have recognized that employee health can have a meaningful impact on profitability.^{8,9} According to the *Towers Watson/ National Business Group on Health 2013/2014 Staying@Work Survey*, 73% of surveyed U.S. employers reported lack of physical activity is an issue in their workforce.³ The employer focus on physical activity is not surprising when you consider the associated risk factors and potential impact on health care costs. A recent U.S. study found that physically active adults have lower annual health care expenditures than insufficiently active adults, and overall, 11.1% of total health care expenditures were associated with inadequate physical activity.⁴ This suggests that encouraging adults to increase physical activity to meet guidelines could have a significant impact on U.S. health care expenditures, with major implications for employers that shoulder a large percentage of health care costs.

One study that followed over 90,000 employees over an average period of three years found that physical inactivity was associated with an estimated 15.3% increase in total per capita annual medical spending.¹⁰

Other studies have demonstrated the link between level of physical activity and medical costs:

- Annual healthcare costs were about \$250 less annually for moderately active (1 to 2 times/week) and very active (3 + times/week) employees than sedentary employees (0 times/week) across all weight categories, with possible savings estimated at 1.5% of total health care costs if all sedentary employees in the study population were to adapt a physically active lifestyle.¹¹
- Medical expenditures of over 35,000 adults revealed that physically active adults used approximately \$300 less in annual medical care services than their inactive peers.¹²

Some studies also reveal a potential association between physical inactivity and lowered productivity due to absenteeism. For example, one study indicated that those who did no physical activity had significantly greater absence rates than those who reported exercising once a week, while another showed that individuals who met recommendations for physical activity at a vigorous intensity level for at least three times a week had 4.1 fewer sick days per year than those who did not meet the recommendations.^{13, 14}

Investing in a Worksite Physical Activity Program

Reviews of the literature demonstrate that worksite physical activity programs along with other wellness programming can be effective in reducing risk factors, including physical inactivity, body weight and BMI. Further, these health improvements can reduce health care spending and generate productivity gains to produce a positive program return on investment.^{15, 16}

There are also a growing number of employer case studies of successful worksite health promotion and improvement programs available through The Health Project. The Health Project [website](#) provides details on annual recipients of the prestigious C. Everett Koop National Health Award, which recognizes outstanding worksite health and improvement programs that document results, both in terms of health improvement and economic impact.¹⁷

Despite these promising results and the clear impact of physical activity on health status, we think it is important to highlight that the return on investment from offering *any* worksite wellness or physical activity program will ultimately depend on many factors that are unique to the organization. For example, existing health status and healthcare costs of the population, current levels of physical activity (or inactivity) in the population, program participation and sustained engagement in the program, and program fees will all impact the potential return realized from offering a program. We recommend working closely with your advisors and program vendor to fully explore any questions or concerns you may have related to program ROI for your population.

Section 3: How to Participate in the CEO Challenge

Requirements

Employers who agree to participate in the Physical Activity Challenge will invite their employees to enroll in a physical activity program and commit to a minimum of 8 weeks of physical activity, during which time employees will track their steps and/or exercise via an employer-sponsored platform. Participating employers must begin their program by no later than October 2015.

Participating employers are also required to share their general program design and both aggregate and average activity levels with an independent team of researchers led by Ron Goetzel, PhD at Johns Hopkins University, to contribute to the identification of strategies that will support successful engagement of employees in physical activity programs by employers across the U.S.

An organizational survey has been developed by the Johns Hopkins team to facilitate the sharing of general program designs by employers. The organizational survey is designed to assess elements of overall health and wellness programs in place, including organizational support and other features such as technology, educational materials, and challenges. It is intended to help identify elements that contribute to meaningful and lasting behavior change.

Participating employers are also asked to work with their program vendors to provide the evaluation team at Johns Hopkins with aggregate and average activity levels. A data collection template has been developed by the Johns Hopkins team to facilitate transmission of this information either directly from the platform vendor or through the employer.

Copies of the organizational survey along with additional information regarding data file requirements and sample layouts can be found at the CEO Council website: <http://www.healthinnovationcouncil.org/>.

Additional Information to Support Evaluation

Employers are also encouraged to invite their employees to complete brief, voluntary surveys to assist with further evaluation by the Johns Hopkins team. These surveys include a pre-challenge survey and short follow-up surveys to be completed after 8 weeks, and then again 6 and 12 months later, to evaluate the impact of physical activity on health and wellbeing and identify effective strategies for driving high levels of participation and sustainable behavior change.

The Johns Hopkins team has developed two survey tools – summarized below – to be administered to all eligible, participating employees (ideally through the physical activity platform vendor) for those employers who agree to participate in the additional evaluation activities.

- An *impact survey* should be administered to all eligible employee participants prior to or as part of the enrollment process and again at the end of 8 weeks. Participants will also be asked to complete a subset of these questions at 6 and 12 months after the Challenge to assess behavior change, improvements in physical activity, and other health outcomes of interest. The results of these surveys

should be sent directly to the independent research team at Johns Hopkins.

- An *engagement and satisfaction survey* should be administered to all eligible employees *invited* to participate in the challenge, regardless of participation. This survey will be administered at the end of the 8-week Challenge and is designed to assess promotional efforts and awareness, participation, and satisfaction with the Physical Activity Challenge. The results of such surveys should be sent directly to the independent research team at Johns Hopkins.

In order to link activity levels with the results of the surveys described above (to assess impact on outcomes), employers are asked to work with their physical activity platform vendors to provide the Johns Hopkins team with de-identified, participant-level activity data collected during the physical activity program. Johns Hopkins has developed a standard data extract and data dictionary which can be shared with vendor partners to ensure they provide usable data. We ask that each participant be assigned a unique identifier to allow for longitudinal analysis of program impact over the course of the study and to link individual activity data with survey responses. All files transmitted to Johns Hopkins should be de-identified.

Copies of all surveys, along with additional information regarding data file requirements and sample layouts can be found at the CEO Council website: <http://www.healthinnovationcouncil.org/>.

Section 4: Best Practices

With the help of physical activity challenge vendors, CEO Council members, and health management subject matter experts, we've assembled a series of "best practices" for consideration as you design and implement your physical activity challenge program. While these best practices can help you launch a successful program that is well received and sees high levels of participation, it is important to ensure that any practice you decide to implement fits with your corporate culture and organization.

Design

Challenges should be structured so that they encourage broad levels of participation, such as at a company or business unit level. Having an all-inclusive approach, where the challenge is promoted to an entire segment of the population simplifies communication and allows for a collective "buzz" around the office or work site that helps drive participation.

It is also important to structure challenges so they are applicable regardless of a person's activity level. This can be accomplished by setting achievable company goals or by segmenting the population into peer groups and rewarding improvement against personal and team goals rather than for just individual performance.

The duration of challenges should be long enough to help employees form and maintain meaningful new habits and see some positive results, but short enough so that participants can focus and set attainable goals. Challenges are typically 4 to 12 weeks in length. Some programs also set interim goals during the course of the challenge to encourage achievement of smaller milestones and encourage continued participation.

Leadership Support and Involvement

Regardless of company size or industry, having leadership support for your program is critical for program success. In particular, executive and management buy-in as well as direct participation helps build program credibility and excitement and improves employee engagement. Examples of successful leadership involvement will vary by company culture and may include:

- Making announcements at company-wide meetings
- Setting departmental or team-wide goals
- Attending the challenge kick-off event and giving motivational talks
- Sharing updates via social media (e.g., posting accomplishments and progress towards goals)
- Competitions between executives or between executives and associates

In addition, local support, such as wellness champions or team captains at various levels of the company can be critical in creating a "face" for the program. These local champions can set an example for their coworkers to follow and can be a valuable resource for assisting with logistics and questions, thereby

alleviating administrative burden from program organizers. If you are able to establish a network of program champions, be sure to provide program resources and tools (e.g., training, FAQs, contact person for escalations) to ensure they have accurate information to share with employees.

Communications and Promotion

There is no “one size fits all” strategy when it comes to successful program communications, though communications should be appropriately tailored to the company culture and audience. For instance, organizations with a younger, tech-savvy population may rely upon catchy video clips and “loud” visual displays, whereas an employer with an older workforce may use more traditional communications such as newsletters, postcards or posters. As noted above, wellness champions can also play a critical role in promoting the program.

While it is important not to create communication fatigue by bombarding employees with communications, people often need to see or hear something multiple times before taking action. As one vendor reported, eligible employees who were asked why they chose not to participate in the challenge often reported that they needed more consistent reminders to participate. Common communication approaches include a series of emails encouraging employees to sign-up for the challenge in the weeks leading up to launch, and then ongoing weekly emails and recaps to encourage continued participation.

In addition, building team-challenges (e.g., location vs. location, department vs. department, executives vs. associates) and incorporating social networking elements such as real-time leaderboards, virtual trophies and support groups help build friendly competition and camaraderie and maintain sustained engagement in the program.

Examples of additional communications tools include: email blasts and system alerts, e-cards, posters, flyers, banners, videos, web ads, screensavers, TV ads displayed on office monitors and health station kiosks, word of mouth promotion through champions, text messaging, mobile apps, benefits fairs and decals for stair corridors and elevators.

Tracking and Reporting

The proliferation of activity trackers and fitness apps makes gathering verifiable activity easier than it was in the past. However, given that many people have their own devices or use a specific fitness app, it is also becoming increasingly important to allow employees the flexibility to use the app or device of their choosing. By doing so, the program can reinforce existing good habits, avoid being seen as a burden to employees, and can make it easier for participants to continue tracking activity after the close of the challenge. While self-entered data may still be offered as an option for those that do not own or want to purchase a tracking device, having to manually enter data is likely to discourage ongoing participation. Some employers also weight verified data more heavily than self-reported data within their incentive design.

While we would recommend using a wireless activity tracker for ease of tracking, it is important to consider that there are fees associated with trackers, and employers should avoid imposing significant “tracker fees” as they are likely to discourage participation. This can be addressed through a “bring your own device” approach, by partially or completely subsidizing the cost of a basic tracking device for those who do not currently own one, or by providing a very basic low-cost pedometer.

If you use a “bring your own device” approach, it is also important to be aware that there is variability between devices (e.g., 10,000 steps on one device may only be 8,000 on another!) and that devices use different algorithms to translate non-step based activity (e.g., swimming, cycling, etc.) into steps. These differences between devices should not detract from the goals of the challenge – to get employees moving – but they should be considered when interpreting results.

With regard to reporting, displaying real time results to participants in engaging ways is critical to promoting continued engagement. In particular, real-time leaderboards with rankings (overall, by location, by department, etc.) are effective in keeping participants interested, as are other methods like infographics that concisely summarize results. In addition, to demonstrate program impact it is important to provide participants with personalized, real-time results in connection with their own activity goals, as well as aggregate employer level reporting. Segmenting reports by elements such as time period, age, gender, HRA results, biometric status and activity levels can help employees better assess performance relative to their peer group.

Incentives

Incentives (particularly “carrots” over “sticks”) play a large part in motivating participants. The most effective form will depend on company culture; however, we see employers obtaining good results without significant financial incentives tied to participation. Social recognition, bragging rights, and trophies (virtual or on-site) are likely to be effective in many companies, especially if there is a competitive culture. In addition, team-based incentives where the payout depends on the performance of the team as a whole can be a great way to foster increased employee connectivity and camaraderie.

Employers may want to use a combination of the above ideas – for example, focus on recognition and team standings during the challenge, and then raffle an award at the end of the challenge. To promote completion of the challenge, the eligible population for the raffle could include employees that are still participating or who achieved a target level of participation during the program. Other incentive examples include premium discounts, raffles, experiential awards such as trips or concerts, gift cards, vacation days, and donation-based prizes.

Program Integration

Employers should leverage existing programs and resources to create awareness of the challenge and encourage participation. This could include having lifestyle coaches refer members into the challenge, announcing the kick-off or winners at onsite events like benefits expos, or rewarding those who complete their Health Risk Assessment with a credit towards a fitness tracker.

For those participating in the challenge, existing resources such as onsite fitness centers, walking trails, or exercise groups can be promoted as a way of helping employees meet daily activity targets. Teams could also be encouraged to participate in fitness classes to increase their collective activity level.

Vendor platforms can also serve as the hub to promote integration with other available wellness programming including onsite fitness centers, coaching, financial services, telemedicine, and transparency tools.

Section 5: Considerations When Selecting a Vendor

While there are many vendors that offer physical activity challenges, there are distinct differences between each. Choosing one that is a good fit for your organization will require careful consideration of program requirements in relation to vendor capabilities. Some employers issue a formal request for proposal to identify a vendor partner, while others simply interview potential vendors and compare pricing. Regardless of your approach to selecting a vendor partner, this section of the toolkit includes specific areas that you *may* want to consider as part of your evaluation process. Please note that these are only suggested areas to consider and it is unlikely that a single vendor will meet all criteria. The areas outlined in this section are not requirements for the 8-week Physical Activity Challenge.

If needed, the BPC can assist in identifying potential vendors for consideration; however the BPC does not have preferred arrangements with any vendors in this space and does not recommend a specific vendor or vendors. For assistance identifying potential vendor partners, please contact Janet Marchibroda, Executive Director of the CEO Council on Health and Innovation at JMarchibroda@bipartisanpolicy.org. If you are a vendor that provides these services and is able to meet the program requirements outlined in Section 3, please also contact the BPC to be added as a potential vendor for consideration by employers planning to launch physical activity challenges.

Vendor Experience

Consider whether the vendor has a proven track record of delivering physical activity programs to similar employers or other comparable experience that would demonstrate an ability to deliver on the scope of services requested. Specific areas to assess may include:

- Ownership structure; potential mergers or acquisitions
- Compliance and insurance
- Financial strength and viability
- Book of business, including current client base
- References
- Partnerships and subcontractors
- Planned investments

Platform and Mobile Capabilities

The vendor should offer a simple, intuitive, and easy to use platform with mobile capabilities that allows individuals to enroll in team-based challenges and track activity. We've included specific capabilities to consider below and would also recommend requesting demo credentials to the vendor platform to see first-hand what your employees will experience.

- Level of customization to meet employer specific brand requirements, including components of the portal that must be present and cannot be turned off (e.g., incentives, vendor branding, etc.)
- Ability to host a brief pre-challenge survey and post-challenge survey (content provided by BPC) to be completed by challenge participants at 8 weeks and again at 6 and 12 months post challenge, and to tie longitudinal survey data to participants' individual activity data
- Ability to share standardized activity data with the CEO Council and to support real-time leaderboards and external content housed on the CEO Council website
- List of devices and apps that currently integrate activity data (e.g., steps, exercise minutes) with the vendor's platform via auto-upload, as well as options for manual data input
- Device registration process for participants with an existing device/tracker
- Device fulfillment process for those without a device, including ability to accommodate a complete or partial employer subsidy for device fees
- Social networking capabilities, including participant blogs and leaderboards and ability to challenge and reward other employees within and across participating locations
- Method for enrollment, tracking, and reporting on individuals and group activity outcomes
- Single sign on to the portal
- Real time incentive points tracking
- Participant and aggregate reporting of activity
- Mobile capabilities
- Social networking functionality
- Global offerings, including countries serviced and customization to different countries and cultures, and any associated limitations

Challenges

The vendor should offer an engaging physical activity challenge lasting a minimum of 8 weeks (based on BPC challenge requirements), with flexibility and supplemental challenges or options for potential continuation beyond the 8 week period based on employer discretion. The following are additional components of the vendor's physical activity programs and challenge offerings to consider:

- Total number and descriptions of different challenges offered
- Ability to support challenges at various levels (e.g. division to division, companywide, individual to individual, company vs. company)
- Individual and team-based offerings

Communications

The vendor should offer a standard set of promotional communications to generate initial interest and drive program registration as well as motivational content to support ongoing program participation, with the ability to offer employer specific customization if desired. The following are additional communications elements to consider in vendor selection:

- Method for promoting the program pre and post-launch to non-enrolled employees, including sample communication materials and customizable elements
- Communications approach, content, and frequency throughout the program, including level of customization possible
- Personalized and targeted messages and triggers used to generate messages to enrolled participants to maximize engagement (e.g., reminders for employees that are not uploading data, positive reinforcement for achievement of daily goal)
- Ongoing communications support, personnel, and resources, and expected vendor vs. employer responsibilities for program promotion and communication
- Sample communications plan including pre and post launch periods and sample communications provided to enrolled members to encourage continued participation and progress towards goals, including level of customization possible

Tracking Devices and Integration

The vendor should ideally have a device agnostic approach to data tracking that allows participants to leverage different devices and mobile apps to track and upload data, as well as the option of manually tracking and uploading data to the platform. The following are additional considerations:

- Available methods for tracking physical activity and uploading data to the portal, including devices (e.g. pedometer, accelerometer); smart phone apps or manual tracking, and distinctions between self-entered and data uploaded from a device
- Activity measures tracked at the individual and population level (e.g., steps, time, calories, distance, pace, other) to administer incentives/contest outcomes
- Type of activity and level of intensity tracked by the program at a team, individual, and/or population level, including walking, running, biking/cycling, swimming or others
- Device fulfillment process and timeline, including option for employers to completely or partially subsidize device cost
- Customer service for device activation, issues, or lost devices, including available hours and contact channels and whether any aspect of customer service or data is off-shored

- Ability to integrate with existing employer-specific programs and resources – e.g., care management, EAP, etc. – to improve the member experience and ensure that members are taking full advantage of their employer’s available programs and resources

Engagement and Incentives

While incentives are an optional component of the 8-week Physical Activity Challenge, employers may want to consider the vendor’s basic incentives administration (e.g., tracking of activity) and fulfillment capabilities (delivery of incentives), including the ability to incorporate an employer’s own specific incentive design. The following are additional capabilities to assess:

- Measures of sustained program engagement, book of business experience, and success stories using intrinsic and extrinsic rewards at different stages of the program
- Creative approaches to engage employees across different populations, beyond financial incentives
- Use of communications, technology, social networking and other techniques to promote opportunities to earn incentives and increase active engagement
- Incentive tracking and fulfillment capabilities, including process and timeline for tracking and redeeming incentives through the vendor or a vendor partner; ability to track participant progress towards goals and administer incentives accordingly; and ability to accommodate different incentive reward structures (e.g. points, cash, account-based plan deposits, gift cards and multiple options)
- Availability and frequency of incentive reporting at the participant and aggregate level
- HIPAA and ADA compliance and ongoing monitoring
- Customer service support; technical assistance and support for participants, the employer, and other program supporters (e.g., fitness center staff, wellness advocates); and dispute resolution

Data Security

Consider whether the vendor has an IT infrastructure, operational processes, and quality control checks to deliver an exceptional member experience, along with the flexibility to support specific employer data security requirements, including limitations on use of contractors or off-shoring of data. The following are additional security considerations:

- Required legal agreements for sharing of any member data and means of sending and receiving data while ensuring data security
- Data storage process and location
- Data security processes and measures in place to protect personal information, including information on method and duration data is stored, transferred, processed, and transmitted
- Protocols for accessing data for employees within the organization

- Data off-shoring, if applicable

Measurement and Reporting

Consider whether the vendor offers real-time or near real-time reporting and data sharing that supports challenge-wide leaderboards and allows for both intra-company and inter-company team challenges. In addition, the vendor should be able to support formal program evaluation efforts by tracking and exporting employee self-reported pre and post assessment data; reporting weekly on steps and activity minutes; and tracking and reporting on key program metrics including employee registrations, participation, and satisfaction. Additional areas to evaluate include:

- Approach to demonstrating program success and impact, including sample reports with metrics around engagement, outcomes, and satisfaction and benchmarking against book of business
- Frequency of available reporting on participation, engagement, participant satisfaction, aggregate activity for participants (steps and activity minutes), self-reported pre/post assessments for participants, outcomes (self-reported at the individual level) and ROI
- Reporting available to participants to track activity and progress
- Evidence (if available) of the program's ability to create and sustain healthy behavior change after program completion, including case study success stories for comparable client populations
- Measures of participant satisfaction with the program and typical results seen
- Ability and timeline for reporting participant data, including pre/post assessment data and ongoing participation and activity data (e.g. steps, activity minutes, average levels of activity by day, etc.) at the member level to a third party for measurement and evaluation in a standardized format
- Willingness to partner with existing and new employer partners
- Ability to provide real time or daily data transfers to facilitate challenges, tracking, and leaderboards

Account Management

Consider the vendor's customer service support to assist employees with issues related to enrollment, device syncing and other general troubleshooting, as well as account management to support program delivery and lessen administrative burden for the participating employer. Additional considerations:

- Background and experience of key implementation, day-to-day account manager, and support team members assigned to the account
- Protocol for planned changes to the designated account team
- Implementation and ongoing performance review meetings identifying areas for program improvement and recommended changes based on program performance and participant feedback

- Level of support needed from the employer pre-launch and during the program in order to achieve optimal levels of engagement and program impact
- Detailed implementation plan with roles, responsibilities, key deliverables and dates based on the desired challenge launch date

Fees and Performance Guarantees

Vendors should quote monthly per-participant or per employee fees for the physical activity program based on an estimated number of participants, as well as any implementation costs and additional fees that may apply for employer specific customizations (e.g., communications, devices, branding, ad hoc reporting).

In addition, employers should seek assurance that their vendor partner will work with them to deliver a successful physical activity program. As such, employers may want to ask about whether the vendor offers performance guarantees for the physical activity program. Performance guarantees vary and may include:

- Implementation commitments
- Participant satisfaction
- Program engagement over designated periods of time
- Individual reporting of progress toward goals
- Incentives/rewards updated daily
- Management level reporting of aggregate activity and participation
- Lifestyle risks and biometric values that the vendor will guarantee improvement for and the corresponding level of improvement and time period (physical inactivity, weight, BMI, cholesterol, blood pressure)
- Return on investment (assessment may include a broad range of program impacts)

While many vendors do not offer performance guarantees for all of the above areas, it is important that vendor and employer interests are aligned and that the vendor can clearly demonstrate its value proposition and program impact over both the near and longer term.

Contracting Expectations

All contracting will be directly negotiated between vendors and employers. The BPC is not negotiating a master contract with any physical activity vendors.

Section 6: Frequently Asked Questions

1) What is the CEO Council on Health and Innovation and who are its members?

The Bipartisan Policy Center CEO Council on Health and Innovation is comprised of chief executives of some of the nation's largest employers who are taking actions to improve health and health care in the United States. CEO Council members are adopting innovative strategies and inviting other employers to join them in their commitment to improve the health and wellness of individuals, the health of communities, and the health care system.

Members of the CEO Council on Health and Innovation include the CEOs of Aetna, Bank of America, Institute for Advanced Health and NantHealth, Johnson & Johnson, McKinsey & Company, The Coca-Cola Company, Verizon Communications, and Walgreen Co.

Senior human resources and strategy executives of each CEO Council member company are engaged in a work group designated to design and lead efforts associated with the *Building Better Health: Physical Activity Challenge*. Jim Huffman of Bank of America and Audrietta Izlar of Verizon serve as co-chairs of this effort.

A Health Care Advisory Board, made up of chief executives of organizations representing clinicians, consumers, and hospitals provide guidance to the CEO Council, along with Senate Majority Leaders Tom Daschle (D-SD) and Bill Frist (R-TN). BPC Health Innovation Initiative Director Janet Marchibroda serves as the Executive Director of the CEO Council.

For additional information about the CEO Council, please visit www.healthinnovationcouncil.org.

The CEO Council is convened by BPC, a non-profit organization that drives agreement on principled solutions through rigorous analysis, reasoned negotiation, and respectful dialogue, on issues such as economic policy, energy, and health care. For more information about BPC, please visit www.bipartisanpolicy.org.

2) What is the Physical Activity Challenge?

As part of the commitment the CEO Council made in September 2014 when it released its initial report, *Building Better Health: Innovative Strategies from America's Business Leaders*, the CEO Council is launching the *Building Better Health: Physical Activity Challenge*.

Through the Physical Activity Challenge, the CEO Council is committing to and inviting other employers to join them in raising awareness of the importance of physical activity, improving the health and wellbeing of their employees, and identifying strategies that will support successful implementation of physical activity programs by all American businesses.

Employers who agree to participate in the Physical Activity Challenge will invite their employees to enroll in the challenge and commit to a minimum of 8 weeks of physical activity, during which time employees will track their steps and/or exercise via an employer sponsored challenge platform.

Method of logging activity will be at the discretion of each participating employer and may support a “bring your own device” approach or allow for manual data entry through the program platform.

3) Why is it being offered and why should employers participate?

Physical inactivity has been identified by the World Health Organization as the fourth leading risk factor for global mortality, accounting for 6 percent of deaths globally.¹ It is estimated to be a main cause for 21-25 percent of breast and colon cancers, 27 percent of diabetes, and approximately 30 percent of ischemic heart disease.¹ Physical activity is associated with numerous health benefits, including lowered risk of cardiovascular disease, metabolic syndrome, type 2 diabetes, and some cancers. It helps control weight, promotes stronger bones and muscles, improves mental health and mood, and can increase chances of living longer.²

Employers also recognize that physical activity can have a positive impact on the health and wellbeing of employees and of the organization. According to a Towers Watson/National Business Group on Health survey, 73 percent of surveyed U.S. employers reported lack of physical activity is an issue in their workforce.³ Another recent U.S. study found that physically active adults have lower annual health care expenditures than insufficiently active adults, and overall, 11.1 percent of total health care expenditures are associated with inadequate physical activity.⁴

Employers who participate in the Physical Activity Challenge will benefit from sharing successful strategies and lessons learned with their peers to improve the success of physical activity programs within their own organizations. They will also contribute to and learn from a formal, independent evaluation that will identify effective strategies for driving high levels of participation and sustainable behavior change. According to a Towers Watson/National Business Group on Health survey, lack of employee engagement was cited by 77 percent of employers as the biggest barrier to success of health and wellness programs.³

Employers participating in the Physical Activity Challenge will be publicly recognized for their leadership in promoting physical activity to improve health and wellbeing. Their involvement in and commitment to the Challenge will be highlighted through press releases, public events, a robust social media campaign, and earned media.

4) Who can participate in the Physical Activity Challenge?

The CEO Council is inviting all employers to participate in the *Building Better Health: Physical Activity Challenge*. All U.S. employers willing to commit to the 8 week timeframe and share their program design and aggregate and average levels of employee activity are able to participate.

5) What are the requirements for participating in the CEO Challenge?

Employers who agree to participate in the Physical Activity Challenge will invite their employees to enroll in a physical activity program and commit to a minimum of 8 weeks of physical activity, during which time employees will track their steps and/or exercise via an employer-sponsored platform.

Participating employers must begin their program by no later than October 2015. Participating employers will also share their general program design and both aggregate and average activity levels with an independent set of researchers led by Ron Goetzel, PhD at Johns Hopkins University, to contribute to the identification of strategies that will support successful engagement of employees in physical activity programs by employers across the U.S.

Employers are also encouraged to invite their employees to complete brief voluntary surveys to assist with further evaluation by the Johns Hopkins team, including a pre-challenge survey and short follow-up surveys 8 weeks after completion of the Challenge and again 6 and 12 months after completion of the Challenge, to evaluate the impact of physical activity and identify effective strategies for driving higher levels of participation and sustainable behavior change. Key outcomes, best practices, and lessons learned will be disseminated following the Challenge.

6) How do employers sign up to participate?

Please contact Janet Marchibroda, Executive Director of the CEO Council on Health and Innovation and Director of the Health Innovation Initiative at the Bipartisan Policy Center (BPC), at JMarchibroda@bipartisanpolicy.org.

7) What will participating employers receive?

Employers who participate in the Physical Activity Challenge will benefit from sharing successful strategies and lessons learned with their peers to improve the success of physical activity programs within their own organizations. They will also contribute to and learn from a formal, independent evaluation that will identify effective strategies for driving higher levels of participation and sustainable behavior change. According to a Towers Watson/National Business Group on Health survey, lack of employee engagement was cited by 77 percent of employers as the biggest barrier to success of health and wellness programs.

Employers participating in the Physical Activity Challenge will be publicly recognized for their leadership in promoting physical activity to improve health and wellbeing. Their involvement in and commitment to the Challenge will be highlighted through press releases, public events, a robust social media campaign, and earned media.

Participating employers will receive:

- Public recognition of their leadership in promoting physical activity through execution of a robust communications and public relations plan;
- Standardized survey tools provided by Johns Hopkins for the formal program evaluation;
- Communication templates from BPC and the CEO Council that can be customized and co-branded;
- Data on what works and doesn't work to inform future efforts; and

- The opportunity for happier, healthier, more productive employees.

8) What are the approximate costs associated with participating in the Physical Activity Challenge?

For employers that already have physical activity programs we suggest contacting your vendor partner to determine any pricing impact. For those that do not already have a physical activity program, estimates of costs associated with launching a program may range from \$1.40 to \$5.00 per participating employee per month, excluding wearable device fees.

9) What are the key dates and timing of the Physical Activity Challenge?

The Physical Activity Challenge is launching with rolling start dates from April to October 2015. There will be a core timeframe of 8 weeks that will be used for evaluation; continued participation beyond the 8-week evaluation period will be at employer and employee discretion. In December 2015 there will be a formal announcement of results (number of steps, number of pounds lost, number of employees engaged and potentially other outcomes) with a more detailed evaluation available in 2016.

10) Who can employers contact with additional questions about the Physical Activity Challenge?

Please contact Janet Marchibroda, Executive Director of the CEO Council on Health and Innovation and Director of the Health Innovation Initiative at the Bipartisan Policy Center (BPC), at JMarchibroda@bipartisanpolicy.org.

Section 7: Sources

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