

LifeWorks@TURCK

A Best Practice Case Study on Workplace Well-being Program Design

Health and education are the most important factors related to human capital. They form the basis of an individual's and a population's productivity and associate population health as a key ingredient to poverty reduction, economic growth, and long-term economic development of a region or entire societies (9,15). As such, both factors are extremely important to business and industry because they prepare the future workforce and (a) optimize the performance of current employees at work and in their home life, (b) positively influence people's lives in general, and (c) reduce overdependency on medical care resources. It is therefore not surprising that during times of ever-increasing medical care expenditures, of which much of the burden is borne by business and industry, employers look to workplace health protection and promotion to better manage their costs (17).

Generally speaking, workplace health programs have proven effective for health improvement (6,10,14,16). Literature reviews also support the notion that workplace wellness programs can generate savings in medical care expenditures and reduce productivity loss (1). However, criticism of these claims has surfaced in recent years as several analyses indicate that the savings may not be as robust as reported (2,3). So, where does this inconsistent view of results come from? Why do conflicting results emerge from systematic reviews conducted by highly credible sources?

Arguably, not all programs are designed to produce results. Whereas workplace wellness programs have become quite common with the vast majority of companies (77%) in the United States (3), the most recent National Worksite Health Promotion

survey points out that only 6.9% of companies have programs that may be considered comprehensive in design (8). Program design matters in producing results, and programs designed according to best practice principles tend to produce better outcomes (5,12). Therefore, a differentiation should be made between well-designed programs and those that do not adhere to well-established known practices related to successful programs.

PRINCIPLES OF BEST PRACTICE PROGRAMS

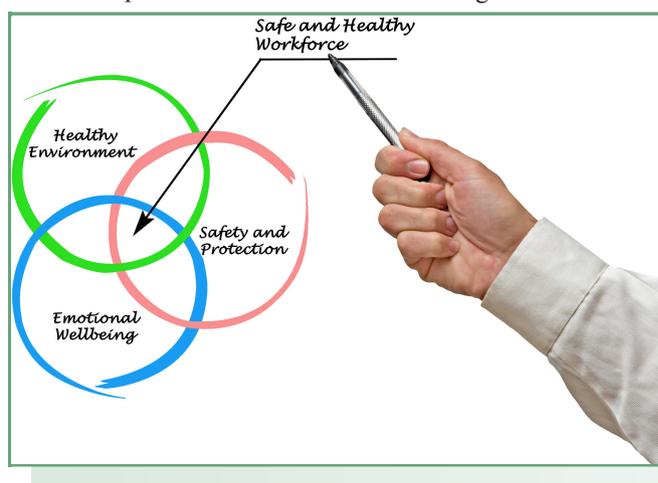
In a previous issue of *ACSM's Health & Fitness Journal*[®], we published a set of 44 best practices that were clustered into 9 practice design principles for wellness programs (11). The best practices identified were based on a review of the scientific literature, the so-called "gray" literature (less rigorous), as well as industry reports, consensus statements, and expert viewpoints. In theory, these 44 elements and resulting 9 principles of best practice design should be closely related to successful programs because they were identified based on such a premise.

To test this theory, we identified a highly successful program, *Life Works @ TURCK*, at the TURCK corporation in Minneapolis, MN (4,7), and applied these principles to confirm this assumption. The data used in this case study come from a well-documented

and predictive health assessment (13), company human resources surveys and data systems, and company-specific health plan reports.

BACKGROUND

TURCK, Inc., founded in 1975, develops, designs, and manufactures technology products such as sensors, interfaces, and connectors that serve the manufacturing and process automation industries. TURCK is the North American headquarters of a German technology company and employs approximately 500 employees in two locations near Minneapolis, MN, and has distribution centers in Michigan and Texas and sales offices throughout the United States (4). In addition, the company employs approximately 700 employees in production facilities in Saltillo, Mexico, although the results of this case study do not include this population. Since 2003, TURCK has worked steadily to build a corporate culture of health and well-being. In 2003, TURCK introduced 10,000 Steps[®] and formed a committee to consider cross-functional benefits to address trends in rising health care costs.



Worksite Health Promotion

Consumer-driven health plans were introduced alongside consumer education in 2005 and 2006 with supportive health and prevention programming in the areas of mindful living, healthy eating, healthy weight, and biometric screening options. This paved the way for the opening of an on-site clinic, in partnership with HealthPartners, in 2007. The on-site clinic quickly established itself as a hub of activity around health, well-being, and medical care by providing services that include screenings for diabetes, cancer, and other diseases. A more comprehensive set of health and well-being programs was introduced in 2008 under the Invest In Yourself program, and a clear connection to five dimensions of well-being was created: financial, social, career, physical, and community well-being (17). On-site health coaching, integrated with the on-site clinic, was introduced in 2010, and some of the major drivers of ill-health and disease burden were addressed. Throughout this time frame, the human resources team needed to find creative and effective ways to engage employees because, among the 500 team members, more than 30 languages were being spoken. The decision was to implement a comprehensive “platform” of services and programs all directed toward the creation of a culture of health and well-being at the workplace, for families, and connected to the community. The idea was to go beyond programs that have a definitive beginning and end; rather, the platform descriptor was used to denote that this effort was to be ongoing and ever improving.

Using the multiple dimensions of well-being, services were introduced as part of this platform that were relevant and meaningful to the TURCK employees and their families. Examples of such services included on-site pharmacy benefits covered at 100%; tobacco-free credits; enhanced work-life benefits; paid time off matched volunteering benefits; and company matches for charitable contributions. Continued enhancement and integration of the platform into strategic planning eventually

led TURCK to become a test site for the integration of occupational health and safety and worksite health promotion — a partnership with the Harvard School of Public Health and the HealthPartners Institute for Education and Research, organized around the Total Worker Health program introduced by the National Institute for Occupational Safety and Health.

When the *LifeWorks@TURCK* health and well-being platform was named by employees, it was already recognized that it had become more than just another program. It had become TURCK’s employment brand. It represents a value proposition that reaches deep into the lives of all employees and their community and aligns closely with TURCK’s core values: to improve quality of life for friends, family, colleagues, and community; to learn and grow personally and professionally; to gain a sense of accomplishment; and realize the passion to believe in and enjoy what you are doing.

LEADING BY EXAMPLE

Although many programs within each well-being dimension were introduced, formal and informal leaders have made a real difference scaling the platform and turning it into “the way things are done at TURCK.” The leadership of the company believes that well-being is important for achieving corporate goals, employee retention, engagement, and innovation. The company created a development track for leadership that supports managers and supervisors in optimizing effectiveness of all aspects of employee and company health and well-being. *Lead by Example* strengthens the connection between the role and behavior of the leader and the impact on his/her team and peers. All executive leaders and the majority of mid-level leaders participated in the program, which included social and emotional intelligence and leadership effectiveness, 1-on-1 health coaching and goal setting; alignment of thinking and choice patterns; authentic leadership style; and strengths,

values, engagement factors, and intrinsic needs. On an ongoing basis, the entire top leadership team fully participates in the program and, as such, they lead by example.

THE IMPACT OF *LifeWorks@TURCK*

As a company, TURCK is interested in measuring impact to evaluate results and facilitate ongoing improvement. Despite a fiduciary interest in a return on invested resources, the company has gone far beyond the traditional indicators of success. From a financial perspective, the platform has been associated with 7% to 8% income from operations or earnings before interest and tax (an indicator of a company’s profitability calculated as revenue minus expenses excluding tax and interest, sometimes to be referred to as “operating earnings” or “income from operations”) — a robust and sustained positive financial impact. However, other factors viewed as being valuable outcomes include reduced turnover rate, attraction of top talent, job satisfaction, recruitment retention of workers, and “willingness to put in extra time as needed” (4,7,12). To be more specific, the company tracks impact across the five dimensions of well-being. Table 1 provides an overview of important outcomes.

Awards and accolades for its well-being initiatives represent another set of indicators that the *LifeWorks@TURCK* platform has had a measurable and meaningful impact on the employees, their families, the community, and the company as a whole. Notable recognition includes being selected as a Minnesota “Top Workplace” for two consecutive years, honored with the platinum-level *Wellness by Design* award from Minnesota’s Municipal Government, receipt of the *Alfred P. Sloan National Award* for Workplace Effectiveness and Flexibility, the 2013 national *HealthLead™ Workplace Accreditation* (bronze level), and the *Outstanding eWorkplace Employer Award* from the State of Minnesota and the University of Minnesota.

TABLE 1: Impacts of the *LifeWorks@TURCK* Health and Well-being Platform

Well-being Dimension	Actions	Impacts
Career — <i>discover and engage your strengths in work and life, like what you do</i>	<ul style="list-style-type: none"> • “Stay” interviews • Promote from within • Tuition reimbursement • Leadership development opportunities • Coaching • Mentor program 	<p>The “Climate of Well-being” survey results indicate:</p> <ul style="list-style-type: none"> • 75% survey participation • 93% gives their best efforts each day • 91% puts in extra time and effort as needed • 89% intends and would like to stay at TURCK for a year or longer • 88% strives to exceed expectation for those they impact each day • 87% is committed to TURCK’s core purpose and values • 4% annual turnover in 2010, 2% in 2011, 1% in 2012 (compared with 13% industry average)
Social — <i>enjoy who you’re with and gain the flexibility to meet your work and life needs (“Makes Life Work!”)</i>	<ul style="list-style-type: none"> • Teleworking opportunities • Compressed work weeks • Flex-time and part-time • ROWE (Results-Only Work Environment) culture • Extended leave • “Whatever it takes, we’ll make it work” attitude 	<p>Social well-being results indicate:</p> <ul style="list-style-type: none"> • Exceeding industry benchmarks for employees feeling they are part of the team, being themselves on the job, and having the flexibility to manage personal and work responsibilities • Since 2009, a 69% reduction in behavioral health visits (from a rate of 480/1,000 to 150/1,000) • Sustained decrease in worker’s compensation and FMLA claims since 2003
Physical — <i>attain energy to live life to the fullest</i>	<ul style="list-style-type: none"> • On-site clinic • Well-being coach • 1-on-1 and group personal training • Fitness center • Education seminars • Smoking cessation programs 	<p>Physical well-being results indicate:</p> <ul style="list-style-type: none"> • External medical office visits declining at a rate of 5.2% year-over-year • Since 2008, a 27% annual increase in on-site clinic visits • On-site clinic net cost savings increased from \$46,000 in 2008 to \$491,000 in 2012 • Compared with health plan trend, TURCK avoided \$4.7 million in health care costs between 2008 and 2013
Financial — <i>create security and plan for your future</i>	<ul style="list-style-type: none"> • 401K Safe-Harbor upgrade • Profit sharing program for retirement • Financial budget planning • 1-on-1 financial counseling 	<p>Financial well-being results indicate:</p> <ul style="list-style-type: none"> • Participation in 401K savings plan increased by 16% in 2011 • <i>LifeWorks@TURCK</i> platform associated with 7% to 8% earnings before interest and tax during the past 5 years
Community — <i>enhance quality of life for others</i>	<ul style="list-style-type: none"> • “Work-Life Pursuit” benefit • Volunteering company match • Charitable giving fundraisers • Blood drives 	<p>Community well-being results indicate:</p> <ul style="list-style-type: none"> • Increased employee volunteering and donations to a personally meaningful cause • 13% increase in employees stating they are “very satisfied” with their benefits since introducing the well-being benefits program

THE USE OF BEST PRACTICE DESIGN PRINCIPLES

It is evident that TURCK has been extremely successful in creating a culture of health and well-being at the workplace. Its journey since 2003 has been well documented and recognized, and measurable results have been observed that indicate that the program saved money on medical care costs and re-

duced productivity loss. Perhaps even more importantly, significant value was created by connecting the program to other important and meaningful resources that the company provides for its employees, their families, and the communities in which they live.

In Table 2, an overview is provided that aligns examples of important components of the *LifeWorks@TURCK* platform with

the previously identified nine best practice design principles of workplace health programs. Based on this alignment, it seems reasonable to conclude that the best practice design principles do indeed support program design efforts to ensure that initiatives are well balanced, adhere to regulatory standards, have strong leadership support, and are relevant to the participant. The best practice design

TABLE 2: The Use of Best Practice Design Principles at TURCK, Inc.

Design Principles and Best Practice Elements	Examples of Best Practice Design for the <i>LifeWorks@TURCK</i> Platform
Leadership <ul style="list-style-type: none"> • Organizational commitment to a healthy culture (mission and vision) • Program connected to company mission, vision, and business objectives • Adequate resourcing • Strategic plan (goals and objectives) • Leadership engagement • Multilevel leadership • Assigned program accountability 	<ul style="list-style-type: none"> • Leadership support to offer a comprehensive health and well-being program for employees and their families • Leadership training to intentionally support employees in their well-being goals • Well-being has been integrated into strategic planning • Leadership willingness to support workplace health efforts nationally by presenting at a Congressional Briefing in Washington, DC, with the IAWHP and ACSM • Participation in SafeWell project with HealthPartners and Harvard School of Public Health to integrate workplace safety and health promotion
Relevance <ul style="list-style-type: none"> • Easily accessible program options • Effective program options (evidence informed) • Tailored programmatic solutions for individuals • Supporting self-care and self-management • Multiple program delivery options and modalities • Family involvement 	<ul style="list-style-type: none"> • Flexible and tailored program options for employees and families • Offer on-site support for health and well-being through on-site health coach and on-site clinic • On-site coach accessible for all employees regardless of language • Offer coaching at individual and group level and run well-being challenges
Partnership <ul style="list-style-type: none"> • Participatory practices • Worker involvement and representation • Community connectedness • Partnership and team oriented (internal and external) 	<ul style="list-style-type: none"> • Strong participation in well-being program • Strong utilization of the on-site clinic • Strong community connectedness, charity giving, and volunteerism are promoted and incentivized through matching opportunities • Combined Safety, Continuous Improvement, and Well-being team
Comprehensiveness <ul style="list-style-type: none"> • Supportive physical work environments and organizational policies • Supportive psychosocial work environments and organizational policies • Assessment of health risks with feedback (health assessments, biometric screenings) • Organizational environmental and policy assessment • Integration of programs and vendors (linkages to EAP, work-life balance, disease management, case management, return-to-work, FMLA, occupational safety and health, occupational medicine, ergonomics, etc.) • Awareness and education programs • Behavior change programs • Multilevel programming (individual, group, management/organizational, environmental, policy) 	<ul style="list-style-type: none"> • Comprehensive health and well-being program including offerings for five elements of well-being: career well-being, social well-being, physical well-being, financial well-being, and community well-being • Platform supports both organizational and individual levels • Complete assessments at both individual level (health assessment, biometric screenings) and organizational level (aggregate reporting, organizational assessments) • Platform integrates a comprehensive set of offerings and services including disease management, case management, and behavioral health • Well-being lunch-and-learns provided on topics including health, safety, and financial education
Implementation <ul style="list-style-type: none"> • Operations work plan • Implementation management system • Population triage, segmentation • Targeted outreach • Dedicated on-site staff 	<ul style="list-style-type: none"> • Strategic multiyear planning • Integrated on-site health coach and clinic • Outreach for those who are at high risk for disease diagnosis (<i>e.g.</i>, prediabetes and pre-heart disease) • Targeted outreach for preventive care reminders
Engagement <ul style="list-style-type: none"> • Human-centered culture • Health and wellness committee • Meaningful and relevant participation incentives • Wellness champions network 	<ul style="list-style-type: none"> • Leadership cares about the health of employees • Strong health and well-being committee integrated with safety team • Strong incentives • “Climate of Well-being” survey indicates a high level of engagement • Very low staff turnover in comparison with industry standards (1% average annual turnover compared with 13% industry average)

TABLE 2: *Continued*

Design Principles and Best Practice Elements	Examples of Best Practice Design for the <i>LifeWorks@TURCK</i> Platform
Communications <ul style="list-style-type: none"> • Program branding • Year-round comprehensive program communications 	<ul style="list-style-type: none"> • Strong brand for overall well-being platform <i>LifeWorks@TURCK</i> • Brand brings together health, safety, and well-being — at home, in the community, and at work • Year-round program offerings
Data Driven <ul style="list-style-type: none"> • Measurement and evaluation • Analysis and reporting • Continuous improvement model • Data security • Data integrity • Data integration 	<ul style="list-style-type: none"> • Use continuous improvement as part of the platform’s evaluation process • Measurement and evaluation of impact of all aspects of the platform
Compliance <ul style="list-style-type: none"> • Regulatory compliance (e.g., HIPAA, GINA, ADA, PPACA, State Law) • Data confidentiality 	<ul style="list-style-type: none"> • The entire platform is compliant with state and federal regulations • Data confidentiality is safeguarded through processes and standards that protect against individual-level reporting

ACSM, American College of Sports Medicine; ADA, Americans with Disabilities Act; GINA, Genetic Information and Nondiscrimination Act; HIPAA, Health Insurance Portability and Accountability Act; IAWHP, International Association for Worksite Health Promotion; PPACA, Patient Protection and Affordable Care Act.

principles may be used as a checklist that existing programs may use to confirm their efforts or to identify potential gaps in their program. On the other hand, companies embarking on their well-being journey may use it as a program design guide. A program design with cornerstone best practice elements will increase the likelihood for success and build toward a comprehensive and meaningful program across time to reap the benefits of a healthy and well culture at the workplace.

LESSONS LEARNED

The *LifeWorks@TURCK* platform is a well-designed, comprehensive, and multilevel multicomponent integrated set of services and programs that has received widespread recognition and may be considered a national best practice case example for workplace wellness. Furthermore, the program serves as an important example of how a company can achieve this level of programming across time. As a result of partnering with other organizations and guided by the evidence of what works, the program has become physically “palpable” within the company and represents the mindset

and ways of being of the people at TURCK. Because it has become integrated entirely into the organizational fabric, it generates not only financial savings but also additional value in both health and non-health-related areas. According to TURCK’s CEO Dave Lagerstrom, “*strong and sustained financial performance of the platform has moved from a breakeven trend between 2003 and 2008 to approximately 7% to 8% income from operations during each of the past 5 years.*” Thus, the integrated approach at TURCK brings together environmental health and safety, a climate of well-being, and continuous improvement that results in sustainable health, well-being, and growth for the company and its employees. The principles of best practice program design seem to capture this initiative well.

Acknowledgments

This work was supported in part by a grant from the National Institute for Occupational Safety and Health (U19 OH008861) for the Harvard School of Public Health Center for Work, Health

and Well-being and the HealthPartners Institute for Education and Research.

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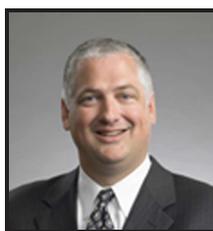
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Disclosure: The authors declare no conflicts of interest and do not have any financial disclosures.



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