

XX Conference 2016 Well-Being Summary Report Mock-Up

The well-being summary report is organized as follows:

[Introduction](#)

[Well-Being Metrics by Dimension](#)

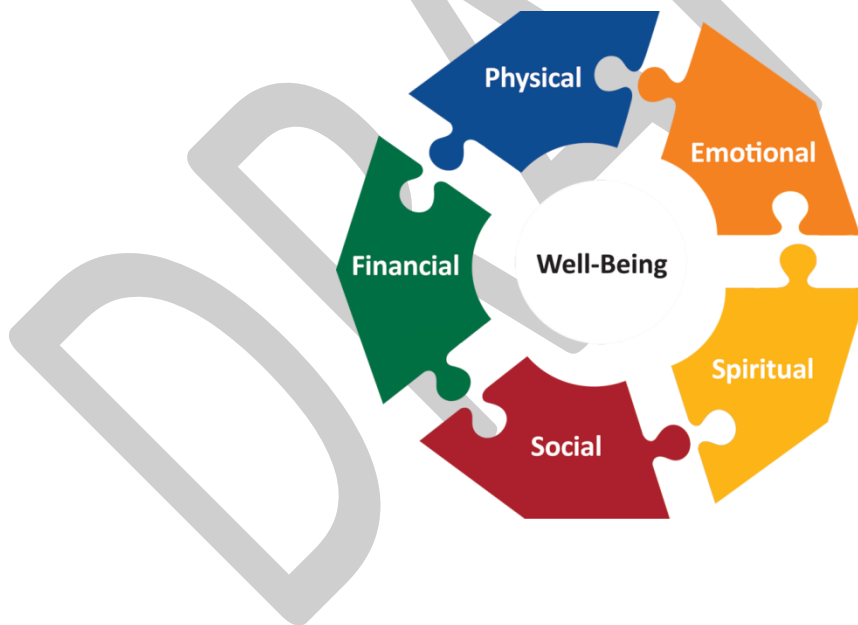
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Introduction

The Center for Health's goal is to promote vitality in mission and ministry by improving the well-being of UMC clergy, lay workers and their families. The Center for Health's well-being activities focus on multiple dimensions: physical, emotional, spiritual, social and financial. Each dimension impacts our ability to thrive and our vitality in mission and ministry.



In this report, we highlight four dimensions of well-being – physical, emotional, social and financial – based on data from well-being and retirement programs you sponsor. At this point in time, we don't have a strong metric for spiritual well-being though we are exploring. We inform how your participants are doing and how they in aggregate compare to others in the connection. The report is designed as a snapshot to communicate *where you are* regarding well-being by dimension and offer suggestions for improvement to help you get to *where you want to go*.

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The metrics in this report are chosen because they are widely used in the well-being arena, have underlying historical data and provide an avenue for education and promotion about your well-being efforts and results.

To help you assess progress with your well-being efforts, we provide you the well-being metrics with a designation of **red/orange/green** as follows:

Red = Bottom 20% of Sponsors for the Metric
Orange = 21% to 79% of Sponsors for the Metric
Green = Top 20% of Sponsors for the Metric

At-a-glance, this “traffic light” score can be thought of as:

Legend

Focus additional efforts to strengthen well-being
Keep attentive to work for improvement
You are doing well and need to keep up the good work

The action plan suggestions in this report reflect your organization’s improvement opportunities based on your metric results.

To provide a sense of the metric for program participation, you can see the information for your members below:

Program Participation Metric	% Participation
Activity program enrollment	37%
Health assessment completed	83%
Biometric screening completed	52%
Employee assistance program utilized	6%
Coaching engagement	22%

Well-Being Metrics by Dimension

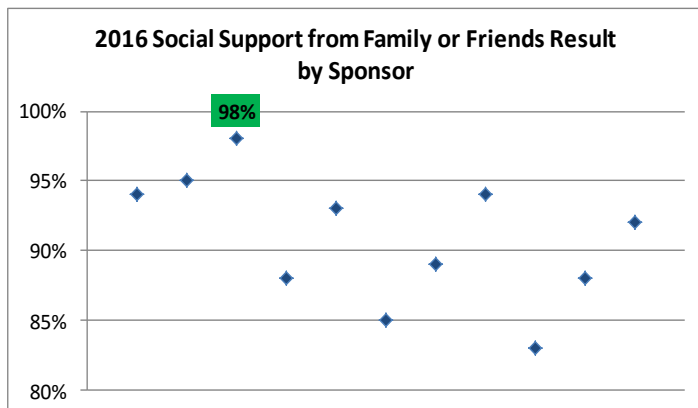
	Metric	Current Year Results	Current Year Average- All Sponsors
Social Well-Being			
S1)	Social Support from Family or Friends	98%	91%
Financial Well-Being			
F1)	Retirement Readiness Based on Wespath Assets	14%	18%
Emotional Well-Being			
E1)	Emotional Health - Healthy Range	88%	84%
E2)	Stress Management - Healthy Range	82%	84%
Physical Well-Being			
P1)	Program Participation (Composite of Several Programs)	49%	55%
P2)	Incentives Earned (Composite of Activity Program Level 3 or Higher and 150 Wellness Points)	18%	12%
P3)	Metabolic Syndrome - Healthy Range	80%	74%
P4)	Low or Moderate Health Risk Factors	49%	45%

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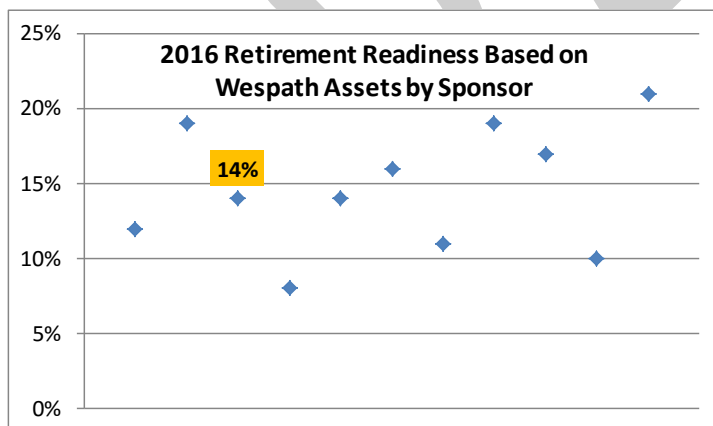
Note that financial well-being reflects the percentage of a participant's estimated retirement income goal achieved. The estimated retirement income goal is calculated as 85% of a participant's income. Financial well-being of 100% indicates that a participant is currently on track to meet the goal of replacing 85% of income in retirement. The financial well-being metric here indicates the percentage of sponsor participants who are at the 85% income replacement ratio threshold.

Your participant results for each of the above metrics are compared to the results of other sponsors with the scatterplots below.

Social Well-Being

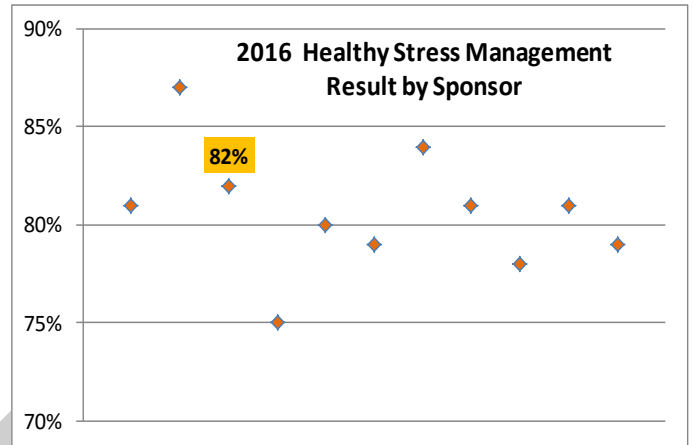
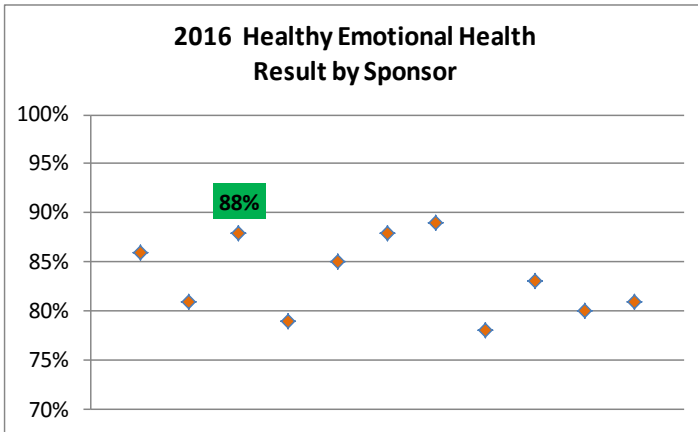


Financial Well-Being

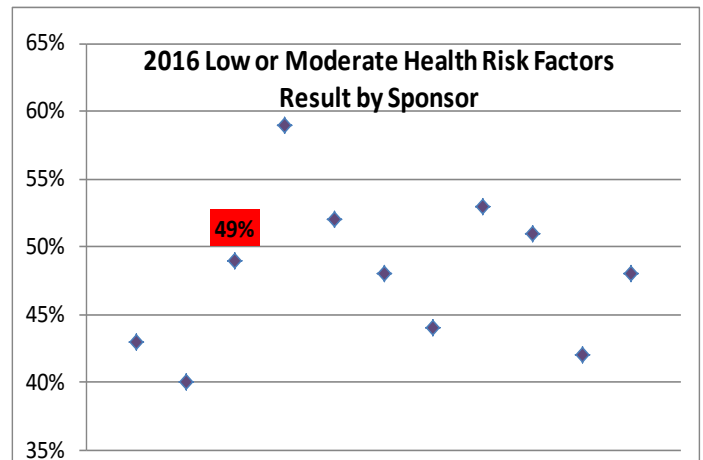
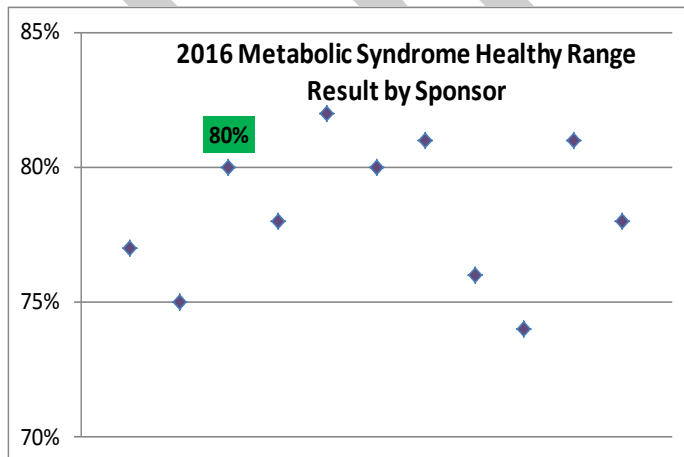
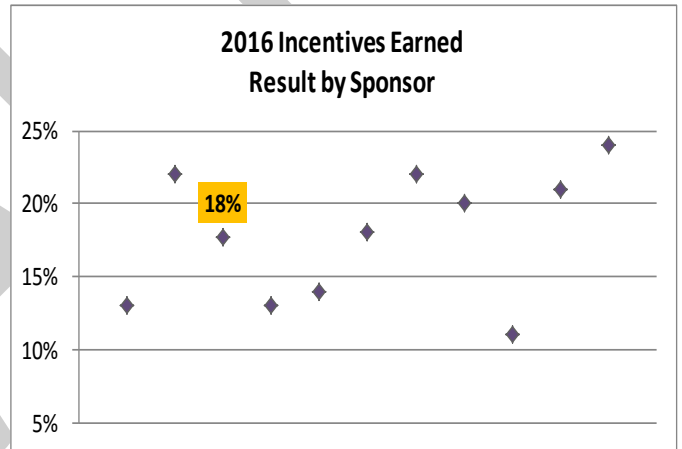
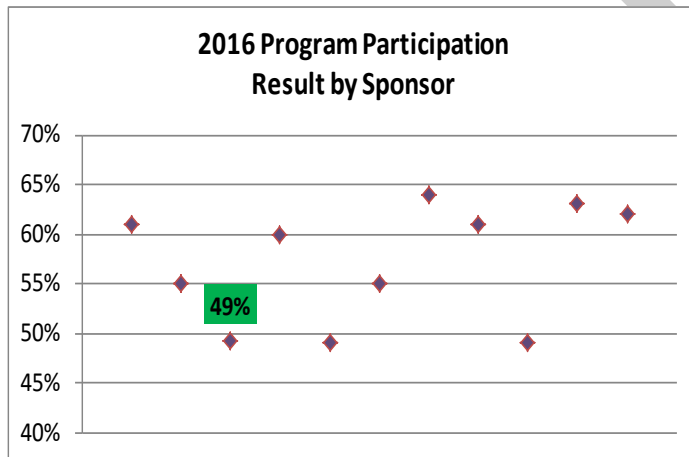


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Emotional Well-Being



Physical Well-Being



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Action Plan Suggestions

A sound action plan begins with having a clear purpose for your well-being programs and initiatives. Action plan suggestions should help take you from *where you are* regarding well-being by dimension to *where you want to go*. Action items for well-being improvement should be specific, realistic and include timing. It is important to know what you want to accomplish with your well-being efforts. The Center for Health suggestions below are best utilized while keeping your goals in mind.

Social Well-Being

Congratulations! Your social well-being metric is strong when compared to other sponsors in HealthFlex. Your participants are connecting well with their peers, family and friends. To continue this trend:

- Use the challenge function in the Virgin Pulse program to create fun and engaging challenges for your participants.
- Encourage participation in the Live and Work Well program.
- Explore or implement a mentoring program for both clergy and laity.
- Explore ways to enhance the social dimension at your meetings and Annual Conference. The Center for Health would be happy to help.

Financial Well-Being

Retirement readiness is in the yellow zone. This means that participants may have some work to do to ensure their retirement is as secure as they want it to be. Wespath has a variety of tools to help. EY and Benefits Access both have tools to assess financial readiness as well as staff to assist with questions and concerns. Please remember this metric represents only those assets that Wespath has under management. Participants may have investments that are not reflected in this report.

Emotional Well-Being

The participants in your conference have reported that they have strong emotional well-being. That's great! One area of concern though is the feelings of stress amongst the participants. While stress is normal, you want to make sure that you build resiliency. Some of the ways to do that are:

- Encourage the use of the EAP services.
- Promote covenant groups and other small groups.
- Explore ways to distribute the CFH Wellness Newsletter to local churches, district offices and throughout the conference or employer group to share the well-being content.

Physical Well-Being

Physical well-being impacts not only physical health but also how we feel about each other and relate to one another. The participants in your conference are engaging with the HealthFlex programs more than other conferences, and it shows in the lower incidences of metabolic syndrome. Some of the ways to improve risk factors and program participants are:

- Continue to promote Blueprint for Wellness, Virgin Pulse well-being program and HealthQuotient completion.
- Promote resources in the Physical Activity Toolkit to highlight a variety of approaches for greater physical well-being.
- Encourage healthy meetings by having stretch breaks, healthy snacks such as whole fruits and vegetables, discourage sodas (and it will save you money).

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- Try a walking meeting for small one on one conversations.
- Encourage participants to take vacation time.

The Center for Health welcomes a consultation with you to discuss how we may best assist you to support well-being improvement for your participants. Please send an e-mail with your interest to wellessteam@wspath.org.

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Resources

The Center for Health has a variety of resources to support your well-being programs and activities. A good place to browse those resources is the [Center for Health Information](http://www.wespath.org/center-for-health/information/) web page: <http://www.wespath.org/center-for-health/information/>. See below for the variety of resources available to individuals, sponsors and participants alike.

Center for Health Information

[Center for Health—Focus](#)

The Center for Health focuses on improving [five dimensions of health](#) and well-being—physical, emotional, spiritual, social and financial—for clergy and lay workers of The United Methodist Church (UMC) and their families. The Center for Health is unique—its multi-dimensional health and wellness focus is specific to the UMC population, its needs, structure and processes.

Offerings include: [health](#) and [welfare plans](#), an [interactive website](#), [denominational wellness programs](#), [health trends and research](#), educational opportunities, and the [United Methodist Church Health Ministry Network \(UMCHMN\)](#).

[Wellness in Action Videos and Stories](#)

Stories lifting up wellness successes for United Methodist clergy, lay workers, and organizations on their quest to improve health and well-being.

[Articles](#)

Articles related to each of the [five dimensions of health](#): [Physical](#), [Emotional](#), [Spiritual](#), [Social](#), and [Financial](#).

[Newsletter](#)

The Center for Health Newsletter supports your path to well-being with useful personal wellness information. Also included are printable wellness bulletins for you to share with your congregation or other group.

[Wellness Toolkits](#)

Educational resources on topics such as prediabetes to help you and those you care about achieve the best possible well-being. Find handouts, FAQs, e-mail communication pieces and more that you can print and share with your congregations or other groups. Look for additional topics coming soon!

[Webinars/Workshop Support](#)

The Center for Health offers support to UMC entities hosting events promoting health and well-being for clergy, lay workers and their families. Several recorded webinars conducted in collaboration with other UMC agencies are also available for viewing.

[Congregational Resources](#)

Resources for fostering healthy churches and congregations, including resources for developing health ministries and parish nursing.

[Healthy You... Healthy UMC Brochure](#)

For additional information about the Center for Health please read our brochure.

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Center for Health Well-Being Programs

Virgin Pulse

Interactive walking program with an uploadable step-tracker and online activity tracking, designed to increase physical activity—one of the best “medicines” around.

Blueprint for Wellness

Onsite and local blood and biometric screenings give individuals a baseline for current health indicators and provide conferences and other plan sponsors with aggregate data about the health of their respective populations.

HealthQuotient (HQ) Health Risk Assessment

Online health questionnaire gives individuals a baseline for current health and health risk status. Provides plan sponsors with anonymous aggregate data about health risks among their respective populations. HQ integrates with Blueprint for Wellness and health coaching for plan sponsors that offer multiple programs.

WebMD Health Coaching

Confidential, telephone-based health coaching guides individuals toward making healthy changes. Health coaches use evidence-based behavior change and motivational interviewing techniques to address each individual’s physical, emotional and other wellness issues.

Employee Assistance Program (EAP)

Employee assistance programs can help individuals manage issues in their personal or professional lives that may impact their ability to perform work or ministry .

EY Financial Planning Services

EY Financial Planning Services can help evaluate your financial situation and address retirement-related and other concerns. EY financial planners have special training in topics important to participants, including Wespath-administered plans and programs, and the clergy housing allowance. EY also offers assistance in:

- Budgeting
- Managing credit card and other debt
- Determining how much to save
- Making investment decisions
- Considering before-tax, Roth and/or after-tax contributions to retirement plans
- Creating an effective retirement plan
- Understanding tax issues
- Evaluating insurance needs and options
- Buying a home or car
- Financing a college education
- And more!

When you speak with EY, you receive professional advice without the sales pressure, since EY does not sell any investment or insurance products. To speak with a financial planner, call EY directly at **1-800-360-2539**, Monday through Friday from 8:00 a.m. to 7:00 p.m., Central time.

** Costs for these services are included in Wespath’s administrative expenses that are paid for by the funds.*

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** Financial planning services are available to active participants and surviving spouses with an account balance in Wespath-administered plans, and to terminated and retired participants with an account balance of at least \$10,000.

EY Information

- [EY Financial Planning Services brochure](#)
- [EY Financial Planning Center](#)
- [EY Form ADV II](#) (disclosure statement)

Sources for Metrics

The sources for the well-being metric results are data from the following:

Metric	Source
Social Well-Being	
S1) Social Support from Family or Friends	WebMD Health Quotient
Financial Well-Being	
F1) Retirement Readiness Based on Wespath Assets	Benefits Access
Emotional Well-Being	
E1) Emotional Health - Healthy Range	WebMD Health Quotient
E2) Stress Management - Healthy Range	WebMD Health Quotient
Physical Well-Being	
P1) Program Participation	
• Activity program enrollment	Virgin Pulse
• Health assessment completed	WebMD Health Quotient
• Biometric screening completed	Quest Blueprint for Wellness
• Employee assistance program utilized	United Behavioral Health
• Coaching engagement	WebMD
P2) Incentives Earned	
• Activity Program Level 3 or Higher	Virgin Pulse
• 150 Wellness Points	WebMD tracking from a variety of program opportunities to earn points
P3) Metabolic Syndrome - Healthy Range	Quest Blueprint for Wellness
P4) Low or Moderate Health Risks	WebMD Health Quotient

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Note: The 150 Wellness Points are earned from the following opportunities:

2016 Wellness Points Opportunities: A Complete Look

Action	HealthFlex Wellness Points Per Action	Frequency Allowed	Maximum Points
Health Measures Rewards (see Healthy Rewards table below) <ul style="list-style-type: none"> Blood pressure Fasting glucose (blood sugar) Triglycerides HDL cholesterol (high-density "good" cholesterol) Waist circumference Body mass index (BMI) Meet AHA guidelines on 2016 Blueprint for Wellness or achieve improved measures on 2016 Blueprint for Wellness as compared to 2015 Blueprint for Wellness.	20 20 20 20 20 20	Once Once Once Once Once Once	120
Complete any WebMD coaching call in 2016	25	6 times	150
Submit success story through the HealthFlex/WebMD website (name/contact information required to receive points but can publish anonymously)	20	Once	20
Have your success story selected (will be notified of selection by HealthFlex)	20	Once	20
View the "Wellness Success Stories" page on HealthFlex/ WebMD website (maximum once per calendar quarter)	5	4 times	20
Select any goal in My Health Assistant on the HealthFlex/WebMD website	5	3 times	15
Achieve any goal in My Health Assistant	15	3 times	45
Access Employee Assistance Program (EAP) for emotional counseling	15	Once	15
Access EAP for Work/Life Services	15	Once	15

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