



Health Coaching Solutions LLC™

Optimal Health Coaching Report

Prepared For:
Company ABC

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Company ABC Telecoaching Progress Report

The following report is a summary analysis of the coaching activity from July 5, 2006 through June 6, 2007. The Telephonic Optimal Health Coaching™ program is provided through Health Coaching Solutions LLC™, a wholly owned subsidiary of Health Solutions Ltd®. This report includes information on the following topics:

- What is Telephonic Optimal Health Coaching™?
- How Does Telephonic Optimal Health Coaching™ Work?
- Incentives / Requirements
- Health Risk Assessment Participation
- Telecoaching Enrollment
- Call Activity
- Health Topics & Behavior Change
- Health Education Materials
- Recommended Available Resources
- Personal Wellness Profile (PWP) / Overall Wellness Rating Chart
- Major Wellness Scores
- Top 3 Risk Factors
- Behavior Change
- Participant Comments
- Recommendations to Enhance Coaching Engagement
- Coaching Plan Objectives
- Telecoaching Report Terminology

What is Telephonic Optimal Health Coaching™?

The Health Solutions Ltd® Optimal Health Coaching™ program targets 100% of the participant population enrolled in the coaching program with the portal of entry being the individual Health Risk Assessment. Focusing on the individual participant's inner capability to use their personal strengths to reduce individual health risks, the goal is to achieve and sustain positive lifestyle behaviors resulting in optimization of the participant's overall health status. This asset based approach provides telephonic one-on-one education, support and guidance enabling each participant the opportunity to set realistic, personal and sustainable health goals based on their individual readiness.

After a brief discussion of specific risk factors identified in their personal health report, individuals engaged in telephonic coaching are encouraged to select an area to change. To support the individual in meeting that goal, barriers are identified and additional support is offered in the form of referral to Health Solutions Ltd® web-based health information, educational mailings and encouragement to use employer sponsored resources available to them through their benefit plan structure.

Follow up telephonic contacts are made on a regular basis to evaluate progress and set new goals as necessary. The frequency of calls is dependent upon the individual's engagement level and receptivity to change. For example, individuals with identified cardiac risk factors such as poor nutrition, physical inactivity and excess weight are encouraged to target goals in the related areas (i.e. improve nutritional habits, increase physical activity through exercise). Supporting behavior change in these areas leads to lower total cholesterol, lower LDLs, higher HDLs, weight reduction, lower blood sugar, and lower blood pressure which

positively impacts cardiac risk. The Coach assists the individual to identify the behavior of greatest concern to them and therefore the one they are most likely to change.

Sample goals in these areas:

- *For the next two months I will eat at least 3 servings of vegetables and two servings of fruit daily.*
- *For the next two months I will eat at least 3 servings of high fiber grains daily.*
- *For the next month I will exercise (walk, swim, etc.) at least 20 minutes, five days a week; for the following month I will exercise at least 30 minutes, five days a week.*
- *For the next month I will limit my high-calorie, high fat snacking to no more than two times a week.*

How Does Telephonic Optimal Health Coaching™ Work?

Within 60 days of enrollment into the program, eligible participants are contacted initially for a coaching session. Individuals who are not reached within two call attempts (or after one attempt if no functioning phone / number) will be sent an “Unable to Reach” letter asking them to respond with the best time to be reached and their current phone number. All participants who receive an “Unable to Reach” letter are eligible to contact a Telephonic Health Coach anytime throughout the program year. All participants active in the Telephonic Optimal Health Coaching™ program are eligible to receive educational materials throughout the year.

The Telephonic Optimal Health Coaching™ program provides health coaching for 100% of participants. Individuals with modifiable health risks who are receptive and choose to be engaged increase the probability of achieving a reduction in lifestyle related health risks and enhancing the probability of disease avoidance*. As previously indicated the total number of calls is dependent on the engagement and receptivity of the participant.

**David R. Anderson, et al. The Relationship between Modifiable Health Risks and Group-level Health Care Expenditures. The Science of Health Promotion. September/October 2000, Vol.15, No.1.*

Incentives / Requirements

- **Participants were required to complete biometrics and the Health Risk Assessment to avoid a \$600 surcharge.**

Health Risk Assessment Participation

- Employee participation rate is 80%
- Overall participation rate is 59%
- Average age of participants is 41.9
- 45% of participants are female; 55% are male

	Eligible Participants	Actual Participants	Total Participants
Employees	2147	1711	80%
Spouses	863	58	7%
Totals	3010	1769	59%

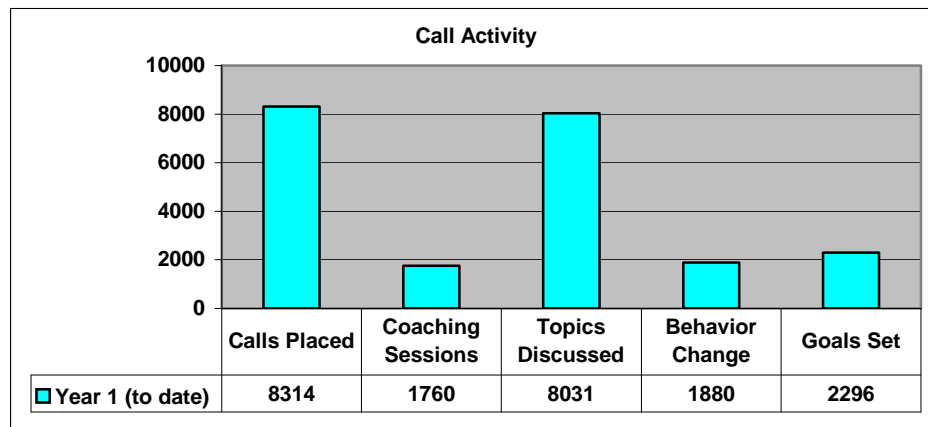
Telecoaching Enrollment

- This table indicates the number of individuals enrolled in the Telephonic Optimal Health Coaching™ program. Each period covers a 12 week time span.

Year 1	July 2006 – September 2006 Period 1	October 2006 – December 2006 Period 2	January 2007 – March 2007 Period 3	April 2007 – June 2007 Period 4
Number Enrolled	1769	1837	1857	1811
No Longer Employed	83	51	67	45
Added Participants	15	31	66	0

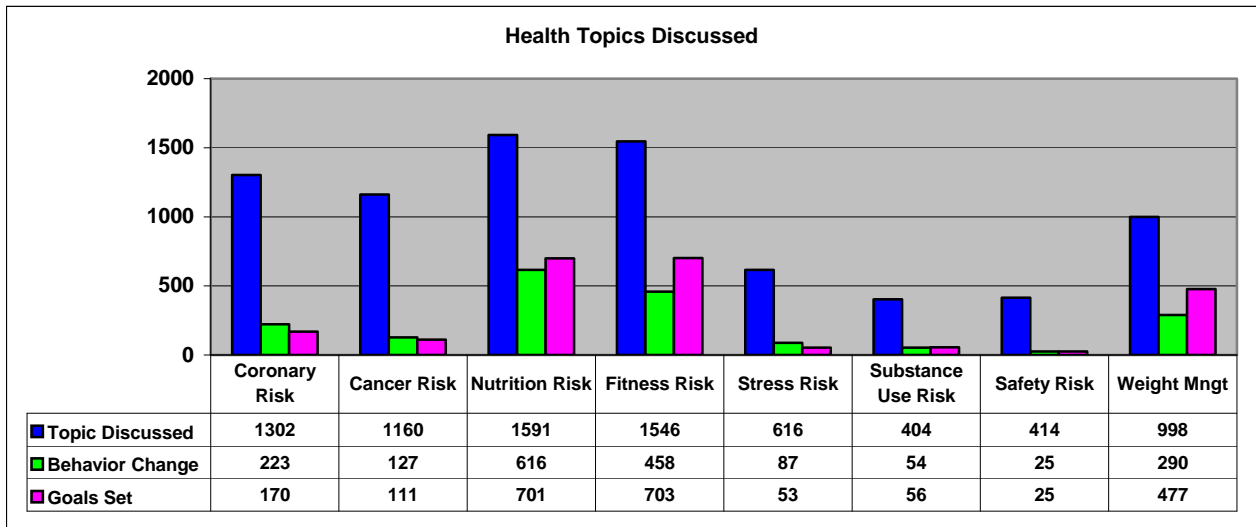
Call Activity

- This graph compares the total calls made to enrolled participants.
- Telephonic Health Coaches place calls to 100% of the participants who completed the Health Risk Assessment.
- Topics covered include those in which the individual scored low on the Health Risk Assessment as well as any additional health issues or concerns identified by the participant.
- Sessions include updates on the individual's health status, stage-of-change, goal planning, risk reduction education, and providing referrals to resources for additional information.



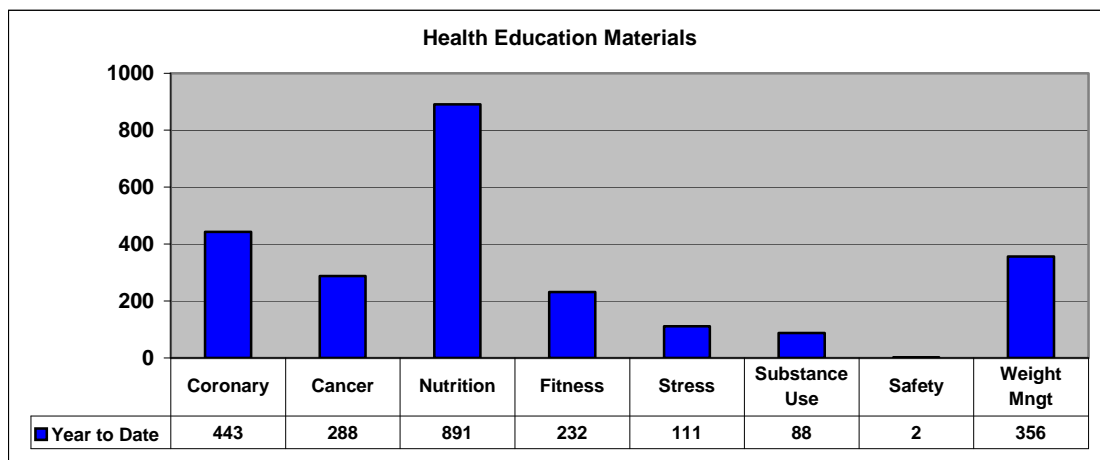
Health Topics & Behavior Change

- This graph compares the main topics discussed during the Telephonic Optimal Health Coaching™ sessions.
- Although other topics may have been discussed, these graphs depict only the major focus areas of the Telephonic Optimal Health Coaching™ sessions. Major focus areas include Coronary Risk, Cancer Risk, Nutrition, Fitness, Stress, Substance Use, Safety, and Weight Management.



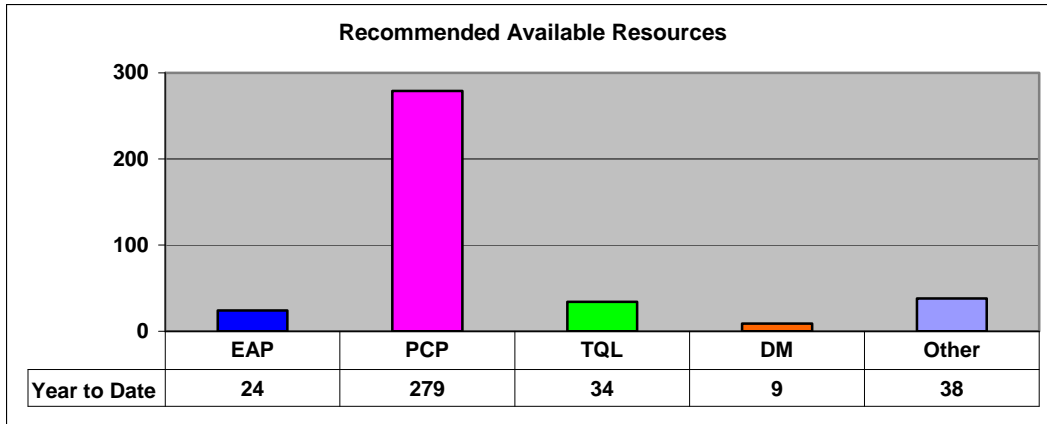
Health Education Materials

- This graph indicates the topic and number of health education materials provided to participants as a result of their coaching session(s) during the covered reporting period. The materials provide additional resources to support and encourage participants in making positive lifestyle changes. Individuals are prompted to use appropriate web sites and encouraged to request information during coaching sessions and through the “Unable to Reach” letter.



Recommended Available Resources

- This graph indicates the number of participants Telephonic Health Coaches referred to additional available resources.

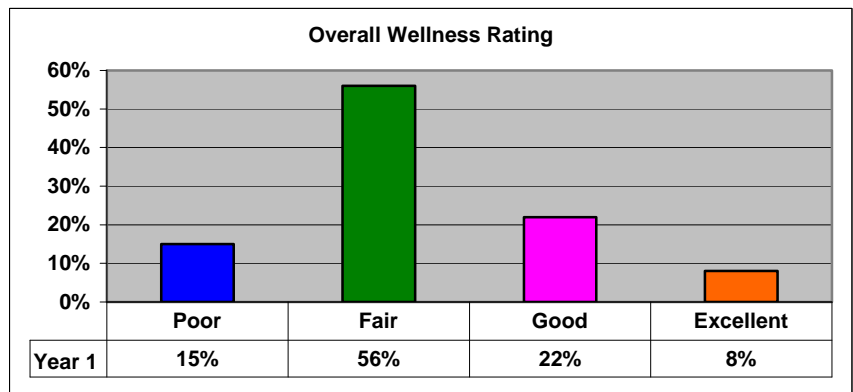


EAP: Employee Assistance Program
 PCP: Primary Care Provider
 TQL: Tobacco Quit Line
 DM: Disease Management
 Other: Question or condition specific websites

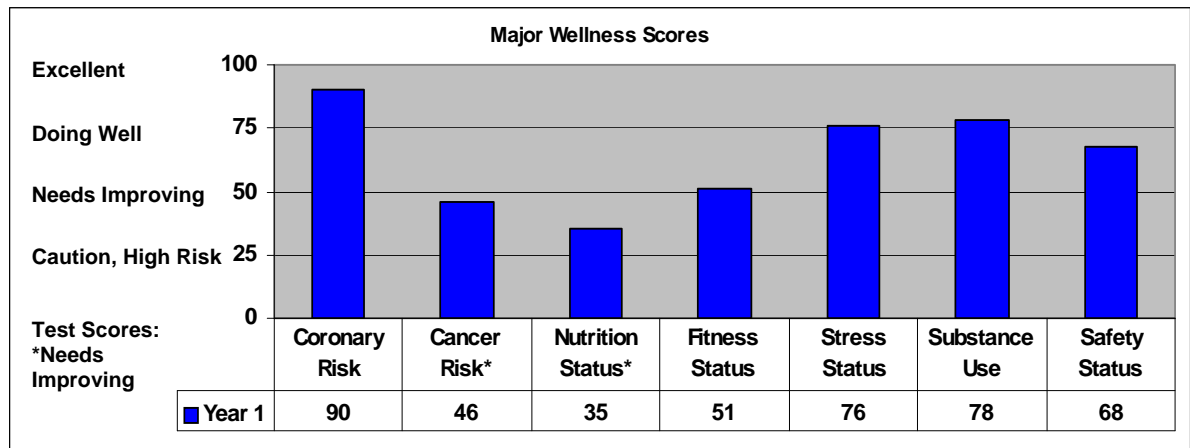
Personal Wellness Profile (PWP) / Overall Wellness Rating Chart

- The overall wellness rating gives a comprehensive score based on the sum of the different major wellness factors.
- The "Overall Wellness Rating" for Company ABC is 43.

Ranges 0 to 100
Excellent 75 to 100
Doing Well / Good 50 to 74
Needs Improving / Fair 25 to 49
Caution / Poor 0 to 24



Major Wellness Scores



Top 3 Risk Factors

Risk Factors	% At Risk
1. Nutrition	79%
2. Cancer	62%
3. Fitness	54%

Behavior Change

- The Telephonic Optimal Health Coaching™ program is guided by stage of change methodology, wherein behavior change is viewed as a process, consisting of the following 5 stages:

Stage	Definition
Pre-Contemplation	Individual does not think he/she has a need for change.
Contemplation	Individual has plans to take action towards change within the next 6 months.
Preparation	Individual intends to change within the next month.
Action	Individual has realized the importance of change and has practiced the new behavior for less than 6 months.
Maintenance	Individual has practiced the new behavior for 6 months or more.

- Stage of change is recorded in each call for all risk areas addressed in the coaching session. Note: Behavior change is complex and not always a linear process directly from one stage to another. It is not uncommon for individuals to recycle through the stages 3 to 4 times before achieving successful and sustained behavior change.
- Participants in the pre-contemplation and contemplation stages are made aware of the value of lifestyle changes. Those in the preparation, action and maintenance stages are in need of support, coaching and encouragement to continue the changes they have made or are working to make.

Participant Comments

- One male recommended we urge Company ABC to reimburse for NutriSystem as he feels Weight Watchers is for women.
- “It seems like the whole office is healthier and people are paying attention to what they eat. There is less going out for lunch.”
- The health and wellness updates to Company Intranet are helpful and interesting.
- My physical activity efforts were kick started by Walk Around the World and I’m looking forward to the next health panel screening to see the impact on my cholesterol.
- Seeing printed information reinforced for the participant that she had been making good decisions all along and helped her realize she does have control over the choices she makes.
- Now takes a healthy walk / break daily.
- “At first I thought this whole wellness thing was a bunch of hooey, but when I look back over the last year I can see the changes I have made in my health and fitness and this feels really great. It is especially helpful when there is a coach cheering you on and checking back and encouraging you – whatever level you are at!”
- “I like this coaching program. It is great to have a caring person checking in.”
- The Weight Watchers program is great. Many people have participated and were able to begin eating healthier.
- The addition of water was a huge success. I feel so much better since increasing my water intake.
- Really look forward to conversations with my coach. I feel it is a win-win situation.
- I always like being checked in on – it helps me stay on track with my goals.
- “This program is working great for me.”
- Several individuals have suggested Company ABC consider providing some sort of health club reimbursement.

Recommendations to Enhance Coaching Engagement

- Continue to encourage healthful behaviors in the workplace. New suggestions include the following:
- Inform vendors that if they are bringing in food to be sure to include fresh fruit and vegetables to increase participants’ fiber and phytochemical intake.
- Have an “endless” fresh fruit bowl in the break room. Rotate responsibility for stocking it. Include the cost in the office budget. Provide a tent card near the bowl stating “Call your health coach to inform them about your increase in fruits and vegetables.” “Eat a rainbow (variety of colors) of fruits and vegetables , aiming for at least five a day to improve your wellness score, ward off cancer, and increase your longevity”.
- Have an ‘office garden’ produce challenge to see who can grow (or bring in) the biggest, tallest, most colorful specimen. Include a tent card congratulating participants on increasing vegetable intake and decreasing colon and rectal cancer risks at five or more servings daily.
- Continue to support weight management related programs. The team approach (Weight Watchers memberships, presentations) has shown results and garnered positive responses from many participants.
- Encourage participants to call their coach to report their progress towards healthier lifestyle behaviors.

Coaching Plan Objectives

- Continue to assist participants to move forward with their goal setting and goal achievement.
- Continue to identify the level of engagement and readiness to change with all participants and encourage them on their journey toward wellness.
- Assist every participant to focus on what is important for each individual: where they are on their journey compared to where they started.
- Provide on-going support and educational materials to participants as they express a readiness to learn more and accept a more challenging path for their journey.

Telecoaching Report Terminology

Telephonic Optimal Health Coaching Components

- Telephonic Optimal Health Coaching™ Sessions, Calls, Contacts
- Optimal Health Plan (Goal Development)
- Methodologies: Asset Based / Stage of Readiness to Change
- Educational Materials and Support
- Program Engagement and Receptivity Criteria

Coaching Sessions

Health Coaches attempt telephone contact with 100% of participants who completed the Health Risk Assessment. Topics covered include those areas in which the individual scored low on the Health Risk Assessment as well as any additional lifestyle related health issues or concerns identified by the participant. Sessions include updates on the individual's progress on lifestyle health behavior stage-of-change, goal planning, risk reduction education, and referrals to resources for additional information and support. Coaches also identify the individual's engagement and receptivity to the coaching program.

Calls Placed

A Health Coach calls 100% of the enrolled participants within 60 days of the participant's Health Risk Assessment being processed. Each attempt to contact an individual is logged. Reasons for not reaching an individual include: not available; phone was busy; phone numbers on the Health Solutions Ltd® HRA and company's eligibility data file were incorrect; and the phone has been disconnected or is no longer in service. If, after two call attempts, an individual is not contacted, the individual is considered "Unable to Reach" and an "Unable to Reach" letter is sent. Participants may contact their Telephonic Health Coach anytime throughout the year.

Unable to Reach Letter

Participants will receive this letter if the Health Coach has not reached the participant after two calls are placed. If a phone connection is not achieved, the correspondence is sent immediately. Participants who respond to the "Unable to Reach" letter will be scheduled for a Coaching session.

Optimal Health Plan (Goal Development)

An Optimal Health Plan is defined as the verbal "contract" developed between a Health Coaching Solutions LLC™ Optimal Health Coach™ and a Health Solutions Ltd® coaching program participant. The purpose of an Optimal Health Plan is to provide a structured framework with timelines, progress indicators and outcome measures targeted to the achievement of the individual's desired health goals and enhanced quality of life.

Methodologies: Asset Based / Stage of Readiness

The asset based approach is used to identify each participant's strengths and potential to achieve his or her optimal level of health by engaging in positive lifestyle health behaviors.

Stage of readiness to change identifies an individual's receptiveness to making lifestyle changes. Health Coaches use this model to select appropriate delivery methods and messages. The objective is to move the individual along a continuum of change until the desired behavior is sustained.

Health Education Materials

Participants are offered a selection of health education materials and referred to appropriate websites based on discussions between the Health Coach and the participant.

Program Engagement and Receptivity Criteria

- Communicate understanding of personal, modifiable health risks contained in the Personal Wellness Profile – as identified through the Health Risk Assessment process – with the Health Coach.
- Accept responsibility for contact by responding to call requests (via voicemail / E-mail message and / or “Unable to Reach” letter.)
- Engage in meaningful dialogue with the Health Coach and recognize that the Health Coach is a trained professional with expertise in health promotion and health education.
- Actively listen and respond to the Coach's questions.
- Be receptive to Coaching support offered telephonically, electronically and through the mail.
- Set attainable, measurable health goals, within a realistic time frame, that are reflective of the individual's stage of readiness toward improving the selected lifestyle health related behavior.
- Communicate ongoing interest in and progress toward health goal achievement with the Health Coach.