



Allegacy Health Metrics Reporting



2016



Introduction

Beginning in 2014, Allegacy was invited to collaborate with the Vitality Institute as a voice for all Small and Medium sized enterprises in the United States. Our engagement in a small working group has been focused on one of five strategic initiatives aimed to improve the health of the United States. The vision of this initiative is as follows:

By 2020, workforce health metrics will be an integral indicator of overall organizational performance within the broader corporate accountability framework. They will be core to existing corporate responsibility, sustainability and integrated reporting, and critical for consideration by all shareholders, potential investors, and key stakeholders.

In 2015, Allegacy became the first organization in America to integrate corporate health metrics reporting into its annual report to employees, board of directors, members, and community. We were driven to take this step by a dedication to our brand promise; we will always do the right thing for your wellbeing. This is a promise that we make to both our employees, members and community.

We believe that investing in the wellbeing of our employees is the right thing to do for our workforce and for our credit union. Therefore, this annual corporate health metrics report provides greater transparency and accountability to creating and sustaining a culture of health at Allegacy. The report will also be available to our field of membership upon request.

2016 Corporate Health Metrics Report

Allegacy has reviewed both objective and subjective indicators of our overall culture of health using the comprehensive health metrics scorecard developed in partnership with The Vitality Institute. These categories were assessed and rated on a variety of categories resulting in a total possible score of between 0 and 100. The Corporate Health Metrics categories and results for Allegacy are as follows:

- Governance
 - Leadership
 - Workforce Needs
 - Community Relations
- Management
 - Corporate capacity & voice of employee
 - Strategic communications
 - Health Programs, Policies, Practices and Population Health
 - Physical Environment
- Evidence of Success
 - Health risk assessment
 - Health status
 - Job satisfaction and Staff Turnover

ALLEGACY'S CORPORATE HEALTH METRIC SCORE

87 OUT OF A
POSSIBLE 100

Allegacy's 2015 corporate health metric score resulted in a score of 87 out of 100. For more information regarding this analysis, and supporting commentary regarding our culture of health, please refer to the attached Corporate Health Metrics Scorecard.



ALLEGACY'S CORPORATE HEALTH METRICS SCORECARD



GOVERNANCE				N/A = Not Applicable	Additional Information
Leadership					
1	Does your company's mission statement, or business objectives, include references to improving or maintaining employee health other than occupational safety and health?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Brand promise - We will always do the right thing for your wellbeing.
2	Does your company support workforce health and well-being at all levels of leadership? For example, are executive, middle management, and front-line leaders all up-to-date, informed, and actively supportive of health and well-being in the workplace?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Our organization enjoys a 94% voluntary employee participation rate of which we have a 100% participation among our executive and leadership teams.
3	Are health, well-being, chronic disease prevention, or wellness topics mentioned in				
	• the annual report,	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Corporate health metrics are shared and discussed on an annual basis in conjunction with our annual reporting process.
	• Form 10-K, or	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	Form 10-K is not applicable in our not-for-profit organization.
	• any other format reported to the board of director at least once a year?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Presented to Board of Directors minimum of twice per year
4	Is there an executive with assigned accountability for employee health and well-being in your company?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Chief Experience Officer and AVP of Organizational Development
5	Does the company have a network or committee which 'champions' health and well-being?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	We utilize both a Wellness Committee and Wellness Liaisons.
Workforce Needs					
1	Has your company conducted a confidential survey, audit, or other assessment that measures how well employees feel they are being supported at work in their efforts to be or stay healthy and well?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	94% of our employees completed a Health Risk Assessment which measures the degree of support employees experience.
2	If yes, was the survey completed by a representative sample of the employees? That is, did more than 50% of employees complete the survey or was the sample that completed the survey a sufficiently large, randomly selected group of employees that will allow for conclusions to be drawn about the whole group?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	94% of Allegacy Employees completed this survey.
3	If yes, what percentage of the respondents provided top results in terms of their perceptions of support for their health and well-being? Top results are indicated by 4-5 on a 5-point scale, 7-10 on a 10-point scale, and by the selection of 'very good' or 'excellent' options.	<input checked="" type="checkbox"/> N/A		%	Data not available.
4	Does your company have a process in place to assess gaps relating to health literacy, health disparities, CLAS standards, and cultural competence, including working with health benefits vendors to see how best to address such issues and topics? For a definition of CLAS standards, see https://www.thinkculturalhealth.hhs.gov/content/clas.asp	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	We have several processes in place that guide our strategic approach to employee health and wellbeing including the use of employee needs assessments, aggregate benefit claims analytics, and annual wellness provider reviews.
Community Relations					
1	Does your company regularly discuss the shared value that is created by actively engaging in community health with other community stakeholders at the company board meetings? Definition: Shared value means that the resulting benefits accrue to both the community and the company.	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Our Brand Promise, "we will always do the right thing for your wellbeing" impacts our long range and annual operating plan including philanthropic giving, community engagement initiatives , and product/service design
2	Does your company partner with community, government and other stakeholders to improve community health?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Allegacy has taken the lead on designing a city wide initiative to positively impact the health of our community entitled; Healthy Winston Salem
3	Does your company engage in strategic philanthropy programs, for example through a corporate foundation?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Examples are Hospice and Palliative Center, Komen Race for the Cure, Center for Smart Financial Choices, & the American Heart Association
4	Does your company extend its corporate health strategy to spouses, dependents, and family networks?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	We extend many resources including onsite gym and fitness class access, educational lunch and learns, and onsite gym discounts.
5	Does your company fund local health promotion activity, provide in-kind services for health initiatives, or otherwise play an active role in supporting local community health needs?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Allegacy is leading the creation and implementation of a city wide effort to improve the health and wellbeing entitled; Healthy Winston Salem

MANAGEMENT	Additional Information		
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Corporate Capacity and Voice of the Employee

1	Does your company have an annual budget or receive dedicated funds for health and well-being initiatives?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	We have dedicated annual budget resources to these initiatives since 2009.
2	Does your company have an active health promotion or wellness committee that is chaired or led by a senior manager or executive?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Our wellness efforts receive oversight and leadership from our Chief Experience Officer and AVP of Organizational Development.
3	Is organized labor (i.e. unions) represented on committees that provide input and guidance regarding the health and well-being program?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	We do not have an organized labor union.
4	Does your company routinely ask employees about their interests and needs in health and well-being services and resources?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	We solicit feedback during our annual Health Risk Assessment and have a needs assessment survey that is open to receive employee feedback
5	How many members of staff (expressed as # of FTEs) have health and well-being as their primary responsibility, and what is the total number of employees at your company?	<input type="checkbox"/> N/A	1/330	#FTE / #-ees	

Strategic Communications

1	Does your company have a branded, planned and strategic approach to promoting and marketing health and well-being programs that is communicated in a regular, frequent, and consistent manner to all employees?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Our wellness efforts fall under the AllHealth Wellness umbrella and are branded as such through our weekly AllHealth Wellness Newsletter and all other initiatives.
2	Does your company target and tailor educational materials and communications to the language, literacy levels, cultural background, age, race, and readiness to change, or to other demographics of the workforce?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Customized communication is consistently leveraged through the one on one coaching sessions employees receive in our program.
3	Does your company highlight employees as role models displaying appropriate health behaviors or employee health-related 'success stories' in the marketing and communication materials for the health and well-being program?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	We highlight employee success stories in our AllHealth Wellness Newsletter and also through a rotation of employee stories that we place in our stairwells.
4	Does your company evaluate the impact of the way in which it communicates with employees regarding the health and well-being program?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	We use analytics acquired from our intranet and subjective feedback from surveys and focus group.

Health Programs, Policies, and Practices, and Population Health

1	Does your company analyze population demographics, cultural and language preferences, or other relevant profiles (e.g. age, gender, disability, healthcare costs, and medical care management needs) to segment the population into sub-populations in order to apply targeted health improvement tactics, resources, and services?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	We use aggregate reviews of Health Risk Assessment Data and Population Health monitoring tools to target health improvements for our organization.
2	Does your company have programs, policies, or practices in the following areas (asterisks denote mandatory elements that must be in place in order for any of the other elements to receive scoring)?				
	• Occupational safety and health*	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Provision of medical benefits for full-time workers, including recommended national preventive services, such as screening guidelines, vaccinations (e.g. as per the ACA for the US)*	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Smoke-free workplace*	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Incentives (including financial) for healthy lifestyle program participation	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Physical activity and exercise	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Nutrition, diet, and healthful eating habits (e.g. access to healthy foods at the workplace)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Alcohol consumption	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Tobacco cessation	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Mental well-being (e.g. stress management, and depression)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Employee Assistance Program (EAP) access for counseling and intervention for those already at high-risk for issues such as stress and depression	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Sleep	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	

• Health coaching	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
• Family-friendly policies (e.g. flexible work schedules or working remotely)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
• Access to healthy office design components based on special needs (e.g. sit-stand desks in cases of back pain)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
• Making the workplace health and well-being programs available for family members and dependents	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	

Physical Environment

1	Does your company intentionally implement healthy design principles? Examples: natural light, access to windows, clean air and good ventilation, and access to communal spaces.	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	In 2015 we enhanced access to natural light, communal spaces while ensuring clean air and good ventilation was present.
2	Does your company have an active management plan in place to monitor and evaluate safety hazards and reports of workplace injury?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
3	Does your company provide opportunities for employees to be supported in or to engage in physical activity? Examples: promoting standing up and stretching regularly, designing walking routes on the premises or immediate surroundings, installing bicycle racks and storage, providing locker and shower facilities, and encouraging the use of stairs by making sure that they are clean, well-lit, properly maintained, and easy to access.	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	From onsite lockers, free fitness classes, and walking trails, to standing desks and incentives for engagement in community walks/runs, our organization continually promotes increased physical activity with our
4	Does your company provide communal spaces where employees can eat, relax, interact with co-workers, and hold private conversations?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	In 2015 we completed several facilities projects that provided private spaces for conversations, and open booth seating for <u>impromptu collaboration sessions or team lunches to be held.</u>
5	Does your company provide access to healthful eating facilities, such as corporate cafeteria services, access to refrigerators and safe food storage for employees, healthy food options in vending machines?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	Our Nutrition@Work café provides healthy food options including company subsidized healthy items to incentivize improved nutritional choices.

EVIDENCE OF SUCCESS	Additional Information
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Assessment of Health Risks

1	Has your company assessed the health and well-being of its employees by, for example, conducting health risk assessment (HRA) surveys or biometric screenings?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	94% of employees completed their Health Risk Assessment in 2015
2	Does your company offer incentives (financial or other) for employees to complete the health risk assessment survey or biometric screenings?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	We offer PTO and Health Savings of Flexible Savings Account monies for completion of the HRA and Biometric Screening.
3	If the answer to #1 is 'yes', please indicate which of the following are included in the health assessment:				
	• Physical activity and exercise	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Healthy nutrition, diet, and eating habits	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Alcohol consumption	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	This is not a standard component of our Health Risk Assessment providers design.
	• Body mass index (height and weight) or waist circumference	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Biometric screening for blood pressure, blood glucose, fatty acids and cholesterol	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Mental well-being, for the purpose of detecting depression	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Tobacco use	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Sleep	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Stress	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
	• Medication adherence	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	This is not a standard component of our Health Risk Assessment providers design.

Health Status

1	Has your company conducted an assessment of the self-reported general health status of its employees using a confidential survey or assessment tool?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A		
2	If yes, was the survey completed by a representative sample of the employees? That is, did more than 50% of employees complete the survey or was the sample that completed the survey a sufficiently large, randomly selected group of employees that will allow for conclusions to be drawn about the whole group?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A		
3	If yes, what percentage of the respondents provided top results in terms of their own health status? Top results are indicated by 4–5 on a 5-point scale, 7–10 on a 10-point scale, and by 'very good' or 'excellent' options.	<input type="checkbox"/> N/A	54	%

Job Satisfaction and Staff Turnover

1	Has your company conducted a confidential survey within the present reporting period that measures the job satisfaction of employees?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A			We complete an organizational culture survey every 2 years and will do so again in 2016.
2	If yes, was the survey completed by a representative sample of the employees? That is, did more than 50% of employees complete the survey or was the sample that completed the survey a sufficiently large, randomly selected group of employees that will allow for conclusions to be drawn about the whole group?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A			
3	If yes, what percentage of the respondents provided top results in terms of their job satisfaction? Top results are indicated by 4–5 on a 5-point scale, 7–10 on a 10-point scale, and 'very good' or 'excellent' options.	<input type="checkbox"/> N/A		%	
4	What is the voluntary staff turnover for the present reporting period and what is the industry average for voluntary turnover?	<input type="checkbox"/> N/A	12	12	company # industry #
5	What is the per employee average absenteeism due to sick leave for the reporting period (e.g. unplanned leave or sick days)?	<input checked="" type="checkbox"/> N/A		d/ee	We do not track sick/absent days as an organization. This is due to the fact that all days missed are logged using standard Paid Time Off



TOTAL	87	out of	100
GOVERNANCE	34	out of	34
Leadership	13	out of	13
Workforce needs	13	out of	13
Community relations	8	out of	8
MANAGEMENT	33	out of	33
Corporate Capacity and Voice of the Employee	10	out of	10
Strategic Communications	10	out of	10
Health Programs, Policies, and Practices, and Population Health	10	out of	10
Physical Environment	3	out of	3
EVIDENCE OF SUCCESS	20	out of	33
Assessment of Health Risks	11	out of	11
Health Status	9	out of	11
Job Satisfaction and Staff Turnover	0	out of	11