



The Alliance is a non-profit, inter-company cooperative with the goal of standardizing the terminology and measurement of the Return on Investment (ROI) of Wellness Programs

### **Membership Benefits and Responsibilities**

**The goal of the Alliance for Wellness ROI, Inc.** is to promote wellness and demonstrate that wellness expenditure is an investment and its ROI can be objectively measured.

#### **Benefits of Alliance Membership:**

- **Receive Financially Proven Integrated ROI Valuation Report including:**
  - Executive summary which provides
    - Integrated Wellness Program ROI
    - Individual Wellness Program(s) ROI
  - Benchmark information comparing individual company to aggregate database companies
  - Details of ROI Analysis, including comments, conclusions, etc.
- **Access to Wellness Program Modeler which provides statistically valid data to help evaluate financial performance of wellness programs such as**
  - Claim savings for using a wellness program intervention (WPI) versus not using a WPI
  - Net annual savings for current wellness program versus new wellness program interventions
- **Access to the Wellness Data Repository for organization wellness program planning:**
  - Ability to review data or run queries, including aggregate data of all member companies' claims and wellness data, updated annually, or data from selected industry competitors. This currently includes over 13+ million records and 175,000+ lives.
  - Be part of the proof that ROI of wellness programs can be measured objectively and network with industry leaders in Wellness Program sponsorship.

#### **Requirements of Alliance Membership:**

Introductory Cost: \$25,000 plus one dollar (\$1) for each employee over the first ten thousand (10,000) employees, plus three thousand dollars (\$3,000) for each vendor over the first twelve (12) vendors; such total fee not to exceed forty-thousand dollars (\$40,000).

#### **Requirements:**

1. U.S.-based organization with 1,000 or more active employees covered by company provided health plan(s) with medical and prescription drug benefits for active employees.
2. Offer (or plan to offer) at least one of the wellness program components to employee population.
3. Provide a minimum of 3 years of de-identified individual participant medical and prescription drug claims history, wellness program(s) participation and workforce population data in Alliance's standard format. Annual data feeds required for continued membership.
4. Execute Business Associate Agreement and Privacy Agreement.

#### **Membership Application Procedure:**

All applications are reviewed and responded to within 10 business days. Final decisions are made based on company size and the applicant's ability to meet the membership requirements and fee payment. Send all inquiries to [info@roiwellness.org](mailto:info@roiwellness.org).

***The Alliance is now accepting additional Members. To get more information or to join, please go to [www.roiwellness.org](http://www.roiwellness.org).***

# Alliance for Wellness ROI, Inc.

An inter-company cooperative, formed to standardize the terminology and measurement of the Return on Investment of Wellness Programs



Thank you for your interest in the Alliance for Wellness ROI. You probably have many questions and would like to know the details of becoming a member, timeline, etc. The below Q&A has been provided to answer some of those questions.

1. Q. Who should you contact to join the Alliance or to receive more information?
  - A. To be considered for membership or receive more detailed information, send an e-mail to [info@roiwellness.org](mailto:info@roiwellness.org).
  
2. Q. What can I expect from joining the Alliance for Wellness ROI?
  - A. You will receive a calculation of proven financial return on your integrated wellness program. If you don't currently have a wellness program, it will measure the projected return on investment (ROI) and net annual savings expected when wellness programs are added, in addition to providing claims savings for using a wellness program versus not using one. Your data will be compared to 175,000+ covered lives in the ROI Modeler.
  
3. Q. How much will it cost my organization to become a member?
  - A. New members will be accepted for an *introductory cost* of \$25,000. The fee will vary by organization size.
  
4. Q. What is different about the Alliance ROI Modeler from other ROI calculators?
  - A. The data repository was developed including claims, eligibility and wellness participation data from each member company. All data is de-identified and merged with other member companies in one database. You can then review data or run queries on all member companies or just a selected industry. The modeler has been tested by actuaries and includes standard reporting for benchmark comparisons.
  
5. Q. What data will need to be provided to the Alliance?
  - A. You will need to provide
    - a) Three (3) full years of claims data for all of your Medical, Prescription and Wellness plans. Examples: Medical, Pharmacy, Mental Health, EAP, Disease Management, Nurseline, Smoking Cessation, HRA, etc.
    - b) Total company population including number of participants and those eligible to participate in the Plan.
    - c) Plan Years included (at least 3 years are recommended).
    - d) Brief Plan Descriptions
    - e) workforce population in total (e.g. all U. S employees)

6. Q. How long will it take for my data to be incorporated into the Alliance database?

A. The Alliance has partnered with VitalSpring Technologies (VST) to develop and maintain the database (Alliance data repository). Once you have forwarded your COMPLETE data feed in the correct format to Harold Dodd's team at VitalSpring Technologies, you will receive a Data Status Report summarizing the receipt and status of your company information and vendor's data within 10 days of receipt of the complete file.

The Alliance ROI valuation report will be completed 30 – 45 days following receipt of complete and final company and vendor data.

7. Q. If you still have questions, who should you contact?

A. If you did not find an answer to your query, please send an e-mail to [info@roiwellness.org](mailto:info@roiwellness.org) for general questions.

For data format questions, please contact Harold Dodds directly at [harold.dodds@vitalspring.com](mailto:harold.dodds@vitalspring.com) or at the below address:

VitalSpring Technologies  
8260 Greensboro Drive, Suite 100  
McLean, Virginia, 22102  
Direct: 703-770-2836

8. Q. What will your organization need to do to remain a member of the Wellness Alliance?

A. Provide annual de-identified data for the following:

- Medical claims data
- Wellness program enrollment data
- Wellness program participation data
- Total company population including number of participants and those eligible to participate in the Plan.
- Committee participation
- Details of your wellness programs including: Disease Management, Employee Assistance Program, Fitness Programs, Health Risk Appraisal, Onsite Medical Appraisal, Screenings/Preventive Care, Smoking Cessation, Telephonic Services, Weight Management, Wellness Education/ Communication, Work/Life Balance, or other)– see Alliance website for full descriptions.

Be part of the proof that ROI on wellness programs can be measured objectively.

[www.roiwellness.org](http://www.roiwellness.org)

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