



PPEA CONCEPTUAL PROPOSAL
iCOACHING

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Commonwealth of Virginia

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BACKGROUND & EXPERIENCE

Founded in 1996 as a pioneer in the health coaching industry, Gordian Health Solutions has a 12-year history of creating solutions that redefine the way health coaching services are delivered.

Gordian helps employers, health plans and government entities identify, control and manage health risk factors and their associated costs through targeted and tailored programs, and sophisticated informatics and reporting capabilities.

Gordian began with a solid scientific foundation for measuring individual health. In the mid-1980s, Eris Survey SystemSM, Inc. (Eris) participated in the development of "Healthier People," the original health risk assessment created in conjunction with the Centers for Disease Control and Prevention (CDC). In 1998, Gordian purchased Eris, moving Gordian to the forefront as the leading provider of health risk assessments and solidifying the scientific basis for Gordian's services.

Gordian's original leadership emerged from HealthTrust, one of the nation's largest healthcare companies, with 40,000 employees in 22 states. As experienced human resources, benefits management and health promotion executives, Gordian's founders dealt directly with the challenge of controlling healthcare costs. Through a series of strategic acquisitions, Gordian combined proven health management components and established a state-of-the-art tracking system for outcomes measurement. This consolidation has resulted in the unique Gordian process of risk evaluation, intervention and results quantification.

Today, Gordian continues to lead the industry in innovation as it pioneers the next generation of health improvement solutions.

NEXT GENERATION HEALTH SOLUTIONS

Blending health science, coaching and technology, Gordian is pioneering the next generation of integrated health solutions for delivering personalized, interactive services that promote healthcare self-improvement and long-term wellness.

Our goal is to reduce the demand and cost of healthcare by encouraging healthier lifestyles, improving self-care and enabling informed healthcare decisions.

Gordian delivers whole-person one-on-one health coaching, individually tailored websites and other media to help individuals achieve and maintain healthy lifestyles and address chronic condition needs. Gordian offers whole-culture solutions for organizational-wide health improvement.

Gordian Health Solutions promotes both individual behavior change and organizational culture change for long-term health improvement and cost reduction. Our services are:

Individual-Centric

Individualized. Individuals face unique pressures and barriers to optimal health and productivity. Gordian's personalized health coaching model, *i*Coaching, helps individuals learn to use their strengths to overcome these barriers and succeed in building long-term wellness lifestyles.

Interactive. Coaches engage individuals to be better informed, motivated and self-directed through multiple interactive channels and tools (e.g. Internet, telephone, onsite).

Integrated. Increased health and financial decision-making responsibility has shifted to the consumer. The imperative for closing gaps in information, access, services and incentives has become a healthcare call to action. Gordian's integrated health services will help your organization answer that call.

Organization-Centric

Industry Leader. Over the past 12 years, Gordian has helped organizations improve health and lower costs by providing best-practice:

- Health Coaching
- Health Portal
- Interactive Tools
- Health Risk Assessment
- Retrospective Claims Analysis
- ROI Measurement
- Incentive Management
- Customer Service

NEXT GENERATION HEALTH SOLUTIONS

Innovative. In today's highly dynamic healthcare market, employers, health plans and government entities need to capitalize on the latest health science and technology to maximize healthcare value and impact. Innovative tools and technologies are combined with demand and change management strategies to leverage how organizations work and how people thrive within them.

Gordian delivers value through services that support whole person and whole culture health improvement. Our behavioral experts guide organizations in developing the cultural infrastructure to support leadership, communication, empowerment and productivity.

Gordian's Winning Focus on next generation services provides the most advanced capabilities and best healthcare value in the marketplace today.

RETURN ON INVESTMENT

Gordian's clients recognize that savings from a healthier workforce come from more than just changes in healthcare utilization; for example, significant savings derive from reduced sick leave absenteeism, increased worker productivity, and fewer short- and long-term disability and workers' compensation claims. Indeed, the June 2004 Integrated Benefits Institute report (www.ibiweb.org) entitled *The Business Case for Managing Health and Productivity* indicates medical care comprises just 19 percent of total costs with ten percent going to wage replacement and 71 percent going to lost productivity, which means total cost recovery ROI from better health behaviors may be as high as 16-to-1 when medical, wage replacement, and lost productivity savings are all taken into consideration.

Gordian is now measuring health-related productivity via the Work Limitations Questionnaire (© 1998, The Health Institute, New England Medical Center Hospitals Inc; Debra Lerner, Ph.D.; Benjamin Amick III, Ph.D.; and GlaxoWellcome Inc. All Rights Reserved). From these member-level data, savings resulting from improved productivity and/or reduced absenteeism will be provided Gordian's clients. However, also estimated separately are claims savings using the most rigorous methodologies available.

Gordian uses a pre-post reference group design for computing claims savings in which program participants are compared with non-participants in claims cost change from pre-intervention to post-intervention. The aim of such a design is to isolate the effect of the intervention. To do so, one must compare participants with non-participants who are similar to participants in most every aspect with one important exception – non-participants are not exposed to the intervention. When tracked over the same period of time, the reference group acts as a proxy for the participant group. Hence, change in the control group is what would be expected of the participant group had they not participated in the program. To accomplish equivalence between participant and non-participant groups, Gordian has used either case matching or multivariate regression modeling. Either method, if rigorously implemented, produces reliable and valid estimations of savings. The method Gordian has used most often of late is the two-step regression modeling approach demonstrated by Ozminkowski et al. in the Nov. 2006 issue of the *Journal of Occupational and Environmental Medicine*. [Copies of this paper as well as samples of \(anonymous\) client economic evaluations can be provided on request.](#)

RETURN ON INVESTMENT

Because claims files are needed for computing ROI, Gordian also recommends clients use our proprietary retrospective claims analysis system (RCA), which is a demand analysis of healthcare costs that nicely complements the supply analysis TPA report. The RCA was developed to measure healthcare costs that have medically documented relationships to unhealthy lifestyles and behaviors. The RCA can be conducted on the front-end of the program for decision support purposes and to benchmark costs by risk factors, age, gender, and relationship (employee/spouse/children). The RCA can thus be re-run every 12 months to gauge program performance in terms of demand cost reduction and health status improvement.

RETROSPECTIVE CLAIMS ANALYSIS

Gordian's three-part Retrospective Claims Analysis (RCA) system is the most powerful in the market today. It is a singularly proactive approach to population health management. Most health care companies conduct retrospective claims analyses based only on ICD-9 codes for disease categories. By merely counting disease states, organizations are looking at only a fraction of their population. Gordian has found such data to be inadequate in fully understanding and evaluating health seeking behaviors and health care utilization across the health continuum.

Gordian's proprietary Self-Care, and Lifestyle analysis engines help clients address early warning signs of illness – for early intervention and upstream cost savings.

- Self-Care Analysis – Includes over 700 self-care related ICD-9 codes for minor or uncomplicated illnesses and injuries that can be treated safely without a visit to the doctor. Higher prevalence of these factors in a population can be used to identify specific wellness areas and programs to promote in the organization, before they become harder-to-treat health risks.
- Lifestyle Analysis – Includes over 1,600 health risk related ICD-9 codes for conditions for which a known health risk factor has been identified. The Lifestyle analysis calculates scientifically attributable risk cost from those diagnosed claims. For example, smoking is responsible for several kinds of malignancies, heart disease and emphysema, among others conditions. Summing proportions of these costs scientifically linked to smoking helps us estimate smoking related costs for specified groups.
- Disease Analysis – Includes 21 disease categories for which a cost effective treatment pathway has been developed. Our Disease Analysis engine identifies individuals living with chronic illnesses and estimates savings potential given improved standards and medical compliance.

Gordian's 3-part RCA engine is the perfect tool to help organizations determine specific risks, focus resources, and cost-justify the implementation of health management programs. Using the RCA year over year also allows organizations to pinpoint need-specific interventions, plan programs, prepare a realistic budget, and track population-wide healthcare demand related trends.

INCENTIVE PROGRAM

The success of a health management program - and the return on investment - depends upon level of participation.

Gordian incentive solutions are designed to maximize enrollment and keep participants engaged in health improvement coaching. Industry research and Gordian's own client experiences have proven that the greater the level of incentive, the greater the program participation. High participation rates increase the chances of success in modifying unhealthy behaviors and reducing healthcare costs.

Gordian utilizes multiple incentive programs for our clients. The type of incentive program depends on a number of factors, including the demographic characteristics of the workforce, union vs. non-union environments, employees' level of health insurance premium contributions, support of top and mid-level management for wellness efforts, the positioning/philosophy of the health management benefit program (an added benefit or a business strategy), etc.

Types of incentives used by Gordian clients include:

Achievement Awards: These are awards (e.g., co-pay waivers, cash, gift cards/certificates, trinkets, raffles) provided at the completion of a health management step, such as completing a Personal Health Analysis, participating in a health fair, completing a biometric screening, completion of a coaching program.

Medical Benefits Integrated Incentives: Medical benefits-integrated incentives are financial incentives that are incorporated into the employer's insurance premium structure (payroll deduction amount) for employees on the health plan and, in some cases, for spouse premiums (if spouses are eligible for the program). These incentives are most commonly designed as a discount to each pay period's premium rate (payroll deduction) based on voluntary participation in the health improvement program and continued adherence to program requirements. Another method is to provide a higher level of benefits for program participants.

Benefits integrated incentive programs have proved to be the most effective means of achieving high levels of participation and therefore improvement in population health status and healthcare costs. While achievement awards are sometimes successful at driving participation for certain behaviors, alone they do not encourage all important program parameters. Benefits-integrated incentives, however, drive all forms of participation optimally because they

INCENTIVE PROGRAM

operate on a continuous program adherence model, therefore linking the incentive to all relevant behaviors (e.g., PHA, biometric screenings, online tools, coaching enrollment and persistence).

Moreover, if implemented correctly, benefits-integrated incentives can create revenue from non-participants which helps to fund the costs of the program, creating ROI from day one. Achievement incentives are often costly (which may hamper realization of ROI) and create lopsided participation results because they only drive participation for the behaviors they are targeting. Combining benefits-integrated incentives with achievement awards may result in successful program participation, since multiple activities may be rewarded using various awards that appeal to various population segments.

Gordian's experience shows that benefits-integrated incentives in the range of \$25-35 per member per month are optimal, driving PHA/screening rates in the 50-65 percent range, coaching enrollment in the 60-90 percent range (of those eligible for coaching due to PHA stratification), and coaching program persistence in the 80-99 percent range). By comparison, programs offering no incentives or only achievement awards achieve PHA participation in the 5-40 percent range, coaching enrollment in the 30-60 percent range, and coaching persistence in the 25-50 percent range.

COMMUNICATIONS CAMPAIGNS

Gordian's most successful collaborative efforts have resulted from providing a complete communications campaign for our clients. Gordian works with our client groups to position their health improvement initiatives as an integral part of their benefits offerings. We work with the employer to present the health improvement program as a benefit designed to help individuals achieve and maintain good health.

PRE-PROGRAM COMMUNICATIONS

Gordian highly recommends that considerable pre-program communications occur to prepare and educate employees on the state of healthcare, both nationally and internally, from a healthcare cost and prevalent risks/disease conditions perspective. This campaign basically describes why a health improvement program is being planned. The following pieces should be considered for distribution to employees, spouses and retirees either as separate printed pieces or incorporated into existing internal communication vehicles:

- National healthcare cost trends
- Client healthcare cost trends
- Key results from a client medical claims analysis
- Reproductions of published articles on healthcare trends

Gordian can provide content for these initiatives.

PROGRAM INFORMATION PACKET

Gordian has developed a standard communication packet to announce and explain the health improvement program to employees. Some of these pieces can be branded with the company's logo or modified to reflect client-specific information about the program at your company (such as incentives and participation requirements). We provide three hours of design time at no charge to the client for basic customization. Extensive branding and modification is billed at a per hour rate. Complete customization is also available to suit the needs of the client. Full custom communications campaigns are quoted on a per-client basis. The standard information packet holds the following standard communication pieces:

1. **Program overview brochure** – This brochure provides an overview of the new benefit, details of the program, any incentives tied to the program, and necessary steps to participate.

COMMUNICATIONS CAMPAIGNS

2. **Card and label insert** – This sheet carries the individual's name and address, a member card with the wellness hotline number, PIN and keycode (necessary for online participation), and a barcoded label for the participant to adhere to his or her completed paper questionnaire (if included) to aid processing of the paper PHA.
3. **Online health coaching insert** – This insert describes the availability and access to the online programs and tools.
4. **Re-access letter** – Explains the process for re-accessing a second year online PHA. (Consecutive years only).

(A paper Personal Health Analysis may also be included in the communication packet along with a postage paid return envelope, but is priced separately.)

Additional communication pieces may be customized (at an additional cost) to reflect client-specific information about the program (e.g., company policy, incentive requirements, testing sites, etc.) depending on services offered and plan design. Please allow eight weeks for customization.

These pieces might include:

1. **Sample executive letter** – This letter provides the framework by which the new benefit is announced. It describes to employees what the new program will look like and supports why a program is being implemented. This letter is designed to be printed by Gordian on the client's letterhead (provided by the client) and inserted into the information folder.
2. **Screening flyer** – Announces health screening dates, times, locations and procedures.

OPTIONAL COMMUNICATION

(provided upon request at no additional cost)

1. Sample presentation for employee meetings – This program orientation presentation provides the details of the new benefit program, how it will work, and gives employees an opportunity to ask questions.
2. Sample screening reminder e-mail

COMMUNICATIONS CAMPAIGNS

OPTIONAL COMMUNICATION

(provided at additional cost)

1. Posters
2. Table tents
3. Postcards
4. Payroll stuffers
5. Articles for internal newsletter

Reminder Postcards

Outreach enrollment postcards are sent to encourage enrollment in health coaching. Once enrolled, if a participant fails to make ongoing telephonic contact, reminder postcards are sent to encourage ongoing participation. These postcards are personalized within the graphics with the participant's first name and can be co-branded with the client's logo.

HEALTH RISK ASSESSMENTS

Gordian is the recognized leader in the health risk assessment market. The original health risk appraisal “Healthier People” was developed by Gordian employees in conjunction with the Centers for Disease Control and Carter Center at Emory University. Today, Gordian develops custom and standard health risk assessments for organizations across the United States and internationally.

Gordian’s health risk assessment, the interactive Personal Health Analysis (*i*PHA), captures a range of information about health and lifestyle, including readiness-to-change and health status. Each *i*PHA identifies current health risks to be addressed by the individual, and can report those in aggregate within a defined population. The *i*PHA is a vital first step to measure risk reduction and improved health status. It is also an important post-intervention strategy to gauge personal positive changes and determine the effectiveness of the overall program.

Gordian's *i*PHA goes beyond the basics to offer state-of-the-art features, including online and bilingual formats. Gordian has incorporated innovative new methodology for estimating life expectancy as well as life years gainable for the individual by making recommended lifestyle changes.

The Gordian health risk assessment is kept up to date annually as guidelines evolve. For example, our risk calculations have been modified to use the NBEP (JNC) 7 Guidelines for hypertension, the NCEP ATP III cholesterol guidelines as the new food pyramid recommendations, and the latest heart disease prevention recommendations from the American Heart Association.

Our sources of scientific standards include: American Heart Association; the National Institute of Health; the CDC; Prochaska’s Stages of Change; Healthy People 2010; and the United States Preventive Services Task Force. Utilizing these accepted industry studies and their tested results, Gordian/Eris HRAs have established validity and reliability.

Gordian’s standard PHA includes the following biometric questions:

- Height
- Weight
- Body fat
- Blood pressure
- HDL
- LDL

HEALTH RISK ASSESSMENTS

- Total cholesterol
- Triglycerides
- Glucose
- Resting pulse
- Waist circumference

Gordian's standard PHA gathers data on the following behavioral health risk factors:

- Tobacco use
- Alcohol use
- Diet and nutrition
- Exercise
- Sleep
- Emotional well-being / stress
- Personal and family health history
- Symptoms
- Functional health status
- Quality of life
- Readiness to change
- Safety
- Women's health
- Men's health
- Low back pain
- Bone density
- Preventive health screenings
- Productivity/presenteeism (via the Work Limitations Questionnaire)

and on the following health conditions:

- Arthritis
- Asthma
- Cancer (colon, breast, ovarian, cervical, prostate, melanoma)
- Depression
- Diabetes
- GERD
- Glaucoma
- Heart disease
- Inherited problems (e.g., sickle cell)
- Menopause
- Migraines
- Pregnancy

HEALTH RISK ASSESSMENTS

Reporting

Gordian's Personal Wellness Report content is designed to reinforce positive behaviors, provide behavior change action items and recommendations, and encourage participation in health coaching and interactive self-help programs. Content is tailored to the individual, depending on demographics, health status and health risks. For example, Gordian's system generates over 300 separate messages about cholesterol depending on age/sex and other responses.

Information resulting from the use of the PHA is valuable in helping users to understand their own personal challenges for improving their health status. The instrument helps to raise awareness, alerts users to symptoms that may warrant a physician's attention, makes recommendations on preventive health screening and immunizations and provides users with the opportunity to decide whether or not they are ready to make the indicated changes.

Customization

Gordian can either customize its standard PHAs or deliver custom-developed questionnaires and reports based on specific client criteria. Customization ranges from simple private labeling to newly created content and design (e.g., artwork, color schemes, length, introductory greetings and instructions, question sets, categories, subject areas, data entry modality, biometric measures, lab testing, report response sets, online links to multiple sites, to foreign translation options. Gordian has created more than 400 custom PHAs (both online and paper versions) for clients throughout the United States and internationally.

Coaching today can be seen as a vehicle of passage, created out of the need to guide people toward healthier and more productive lifestyles – through prevention and risk reduction. Gordian’s personal health coaching has always been grounded in advanced behavioral science, with proven success in increasing individual productivity and quality of life, and lowering health costs

Gordian’s *i*Coaching program guides individuals in facing new generational challenges by leveraging the latest in consumer engagement techniques and technology.

Centered on the needs and preferences of the individual, Gordian’s *i*Coaching services are designed to:

- Help individuals bridge the gap between wanting to be healthy and making choices to live that way.
- Move individuals toward what works for them, rather than “fixing” problems.
- Encourage individuals to be in charge of their life and lifestyle – building intrinsic motivation for long-term health and wellness
- Support next-generation, consumer-directed healthcare through better informed and engaged consumers.

Method

Gordian’s *i*Coaching process is a paradigm shift from traditional health management approaches that target “sickness” in time-limited contexts. Our Health Coaches partner with individuals to develop a personalized health program that is:

- **Individual-centric.** Gordian’s whole-person *i*Coaching process acknowledges that individuals may be simultaneously struggling with a chronic illness, at risk for other health conditions, and seeking to improve overall wellness. Personal Health Coaches meet individuals where they are – whether they are simply beginners or highly accomplished in setting and reaching their health goals. Our coaches offer guidance in addressing one or more health or lifestyle needs within a flexible coaching structure and time frame.

- **Strengths-based.** Individuals face unique pressures and barriers to achieving optimal health and productivity. Behavioral research has proven that the most important predictors of health are the individual's strengths and resources used to overcome these barriers. Coaching begins with an assessment of personal health *and* strengths, to identify the best pathways toward a long-term wellness lifestyle.
- **Relationship-driven.** Research has shown that the quality of a therapeutic alliance – based on trust and collaboration – is the second most critical determinate of outcome. Individuals are assigned a Health Coach to provide education and guidance, from initial need identification to final goal achievement. The result is a strong coaching partnership that fosters extrinsic and intrinsic motivation for behavior change.
- **Behavior-focused.** Gordian's coaching is grounded in the principles of positive psychology (Seligman), focusing on personal strengths and engagement. In addition, *i*Coaching integrates behavior change principles from several well-established psychological disciplines, including transtheoretical/readiness-to-change (Prochaska), humanistic, behavioral and cognitive psychology. Gordian's success in driving individual behavioral change has been proven to reduce costs.

Delivery

Gordian's *i*Coaching builds productive partnerships through two-way communication between the individual and the Health Coach. Individuals are allowed unlimited access to coaching through multiple methods of engagement—telephone, online tools, secure e-mail, and/or direct mail—to suit their schedules and preferences. Coaching engagements are personalized with flexibility in duration and frequency. Gordian's Coaching Center is staffed by a team of professionals trained in areas such as exercise physiology, nutrition, smoking cessation, asthma, heart disease and diabetes. Coaches motivate, support, guide and educate individuals to make lifelong changes that reduce risks and improve overall health.

The Health Coaching Center is staffed by a team of professional Gordian Health Coaches trained in such areas as exercise physiology, nutrition, smoking cessation, asthma, heart disease, and gastroesophageal conditions. Through the Internet or our convenient hotline, participants can obtain general health and wellness information or specific information on recommended exercise routines, cholesterol, blood pressure, and many other health topics.

The hours of operation of our coaching center are 7:00 AM-10:00 PM Monday through Friday, and 9:00 AM – 4:00 PM Saturdays Central Time.

Gordian's needs-analysis engine identifies both needs and condition risk levels. Low risk or healthy individuals may seek assistance in enhancing their present diet and exercise routine, preparing for a marathon, understanding a family member's illness, or preventing heart disease, given a family history for this condition.

Moderate and high-risk participants are encouraged to seek higher-intensity coaching to address their more complex needs. Coaches guide individuals and ask questions relating to signs and symptoms to determine if an individual has an unstable condition that is non-compliant or needs additional support. They monitor a participant's personal health record to make sure they are receiving appropriate preventive and medical care, and completing recommended self-directed educational lessons. Coaches will also encourage appropriate follow-up care with the participant's primary care provider.

In general, coaching intensity will depend on individual needs. Any individual can schedule as much time as necessary with a Health Coach to help them achieve their goals. An individual who is trying to quit smoking may request weekly email/call support, whereas an individual who is trying to control their asthma may only request monthly email/call support, because they are receiving primary medical management through their physician.

Gordian offers unlimited access to the Health Coaching Center for each participant, tailored to each individual's needs. Thus, if a person needs to speak with their Coach by phone every day, they can. If a person wants to communicate with their Coach via an email once a week, that is what they get. On average, there are 2-4 contacts per month between a Coach and an individual participant. Up to 30 percent of those are accomplished by phone, with the remainder accomplished online through Gordian's coaching platform.

Gordian's Lifestyle Coaching provides proactive, ongoing health improvement coaching for individuals on an as-needed or as-interested basis. Participants identified with specific health risks are asked to participate in telephonic or online coaching and/or self-directed health education in order to achieve personal health goals. Gordian's Health Coaches work with each individual to establish his or her goals and provide educational information, counseling, motivation and support to effect behavioral change. Coaches contact participants at least 2-4 times monthly to track compliance with their plan, determine roadblocks to progress, assist with problem solving, and provide information/education as needed.

LIFESTYLE COACHING TOPICS

The following Lifestyle Coaching topics are delivered online and/or telephonically and are supported by online and printed educational material and behavioral change activities:

Cholesterol

Cholesterol coaching concentrates on teaching participants about cholesterol control—what it is, how it affects the body and health, and what lifestyle choices are necessary to reduce and maintain healthy cholesterol levels.

Smoking Cessation

Gordian's self-help smoking cessation coaching combines nicotine replacement therapy with a wide variety of resources designed to assist individuals committed to breaking the smoking habit. This comprehensive program addresses the behavioral difficulties inherent in smoking cessation.

Blood Pressure

Blood pressure coaching advises participants on their blood pressure, assists them with behavior modifications that will result in positive change, and provides them with an overall understanding of the importance of blood pressure control and its effect on their health.

Weight Management

Weight management coaching focuses on helping participants learn to control their weight for healthier living—a process that goes beyond just eating less and exercising more.

Fitness

Participants learn how to make physical activity a priority in their lives and to “fit it” into their everyday activities. Participants, whether they are currently fit, want to improve their physical shape, or are “couch potatoes,” are taught self-assessment and skill-building activities to help improve their personal level of fitness.

Stress Management

Typical stress management programs teach individuals to deal with stress by exercising, sleeping better, and using relaxation techniques. Gordian agrees with this physical approach, but goes a step further by discussing emotional barriers and misperceptions and teaching individuals to challenge negative assumptions and use personal strengths to make meaningful life changes.

Diabetes Management

Pre-diabetes coaching is designed to delay, if not prevent, the development of diabetes. Participants receive educational materials on diet, weight loss, exercise, and preventive self-care. Compliance with treatment plans and attendance of regularly scheduled physician appointments is supported.

Pre-Osteoporosis

Osteopenia coaching is designed to prevent development of osteoporosis. Participants receive educational materials on nutrition, supplements (calcium and vitamin D) and exercise. Health Coaches provide motivation and education on all relevant lifestyle changes.

CHRONIC CONDITION COACHING

Gordian’s Chronic Condition Coaching is designed for individuals with an existing chronic condition. Coaching sessions assist individuals in complying with the behavior changes and medical instructions provided by his or her physician. Gordian’s Chronic Condition programs do not interface directly with physicians or prescribe EBM protocols.

Gordian's goals for participants engaged in our Chronic Condition Coaching are:

- improved participant compliance with prescribed treatment plan
- improved patient knowledge about the condition
- assisting the participant in achieving control of the condition
- improved patient health status

- ongoing self-management to reduce future healthcare service utilization.

CHRONIC CONDITION COACHING FEATURES

Gordian's Chronic Condition Coaching programs are designed to make better use of proven methods to identify and treat individuals with targeted chronic illnesses.

Our focus is to maintain and/or improve the health of participants diagnosed with a chronic condition. Individuals who do not have equipment to monitor their condition may request devices such as a blood pressure cuff, blood glucose and peak flow meter, relative to their condition.

CHRONIC CONDITION COACHING TOPICS

Heart Disease

Heart Disease coaching concentrates on participants identified with heart disease. Each participant is sent educational materials relating to his or her condition. The participant is assigned to a Health Coach and together, they develop an individualized care program to maintain or improve the participant's health.

Asthma Management

Participants are educated regarding their asthmatic condition. Each participant is sent asthma educational materials and a peak flow meter if needed. A Health Coach will work with the participant to develop an individual compliance program. Participants are encouraged to identify their asthma triggers and avoid them.

Gastroenterological Reflux Disease (GERD)

Digestive Disorder coaching is for participants with gastro esophageal reflux disease. Participants are sent educational materials specific to their illness. An individualized program is developed between the Health Coach and the participant to best improve health and lifestyle.

Cholesterol Reduction

Cholesterol coaching offered by Gordian concentrates on teaching participants about cholesterol control—what it is, how it affects the body and our health and what lifestyle choices are necessary to reduce and maintain healthy cholesterol levels.

Diabetes Management

Diabetes coaching is designed to increase the control and self-management of diabetes. Participants receive a glucose meter if needed and educational materials relating to insulin or non-insulin control. Compliance with treatment plans and attendance of regularly scheduled physician appointments are encouraged.

Blood Pressure Control

Hypertension coaching assists participants with behavior modifications that will result in positive change, and provides them with an overall understanding of the importance of blood pressure control and its effect on their health. A home blood pressure monitor is provided if needed. Compliance with treatment plans and attendance of regularly scheduled physician appointments are encouraged.

Weight Management

Weight Management coaching concentrates on participants identified with the chronic condition of obesity, i.e. BMI equal to or greater than 30. This condition puts them at a higher risk for medical conditions, such as cardiovascular disease, hypertension, dislipidemia and diabetes. This program focuses on nutrition education, exercise education and other modifiable behaviors that contribute to obesity. The individual works with a Health Coach to develop an individualized action plan (IAP) to achieve healthy long-term, gradual weight loss and relapse prevention.

Low Back Pain

Back Pain coaching is designed to help individuals with low back conditions originating in the lumbar spine, sacrum, and coccyx that can be associated with pain, as well as radiating pain from compression or irritation of lumbar nerve roots. Coaching does not address back pain originating from primary neoplastic, infectious or inflammatory causes, or associated with pregnancy or major trauma. The program's purpose is to positively affect changes in functional limitations, increase worker productivity, decreasing disability, and to control costs associated with low back conditions.

Migraine Management

Migraine Management coaching is designed to increase the control and self-management of migraines. Participants receive health coaching and educational material to increase their understanding of migraine symptoms, importance of keeping a headache diary, how to identify migraine triggers, medical and non-medical treatment tools, and the importance of stress management. The program goal is to assist the participant in preventing or minimizing migraine attacks.

Osteoporosis

Osteoporosis coaching offered by Gordian concentrates on teaching individuals about effective osteoporosis treatment including medications, exercise, importance of calcium and vitamin D, fall prevention and the role of tobacco use and excessive alcohol intake. Each participant receives a pedometer to promote exercise. The participant and Health Coach develop an individualized care program with the goal of decreasing fracture risk.

Gordian's Next Generation Self-Health tools allow individuals to assess, discover and track their health – on their time, on their terms. Our Web 2.0-based health portal, **iCoach4You**, is Gordian's gateway to dedicated **iCoaching** and also serves up a full range of self-directed and interactive health management tools. The site is customizable at the client and individual levels to provide a seamless, personalized experience.

Gordian's proprietary coaching platform offers an integrated user experience starting with the Personal Health Analysis (PHA) and continuing through lessons, online tools, educational information, incentives and additional services. Materials supporting **iCoaching** topics are developed by Gordian's Health Coaches to integrate our coaching philosophy and messaging across all media. Print-on-demand technology supports personalized lesson plans consisting of only pertinent information and topics, rather than structured programs. Coach-selected content is provided to participants through their personalized web portal.

Services are individualized, interactive and integrated, as follows:

- ▶ **iPHA** = Completion of a PHA generates individual coaching stratification and recommendations
- ▶ **iManage** = Individual PHA data is uploaded into a health profile wizard, where preventive health screening information is requested. Additional information, such as insurance, emergency contacts, and primary care providers may also be recorded, generating the Personal Health Record (PHR).

Preventive Health Record and Preventive Care plans identify, organize, and track over 150 recommendations for preventable diseases and medical conditions, and lifestyle and personal behaviors, as well as common injuries. Individual recommendations are supported by culturally competent video-on-demand presentations and comprehensive educational content that explain their importance, associated risks and general procedure for compliance. All recommendations are interactively managed, including email reminders and completion history, to enforce an on-going process of taking action. Individual preventive care plans include specific recommendations for:

- Laboratory tests
- Physical examinations
- Special medical procedures
- Advisable self-care
- Mental health
- Screening results and biometrics
- Nutritional needs
- Physical activity
- Substance use
- Personal injury prevention

Culturally specific health videos incorporating evidence-based best practices for medical and lifestyle risks are provided for Caucasian, African American, Hispanic, Indian American and Asian American ethnicity groups. Preventive care recommendations are specific to the individual's personal risks, age, gender, family history and ethnicity. Trusted physician video counseling with culturally competent delivery of recommendations engages people with personalized messaging that empowers, educates and motivates them to take action.

Gordian is currently finalizing the development of our integrated Personal Health Record, with final quality assurance steps scheduled for completion in June 2008. The PHR is designed to store the following types of data elements: Personal (Demographic) Information, Emergency Contacts, Healthcare Providers, Insurance Providers, Legal Documents and Medical Directives, General Medical Information, Allergies and Drug Sensitivities, Conditions, Surgeries, Medications, Immunizations, Doctor Visits, Hospitalizations, Other Healthcare Visits, Clinical Tests, Pregnancies, Medical Devices, Family Member History, Foreign Travel, and Therapy.

The Gordian PHR is designed to be integrated with the other data sources available to the Gordian platform—such as Personal Health Analyses and Biometric Data—and used to assist in the Coaching process and content delivery.

The Gordian PHR is an electronic, lifelong resource of health information needed by individuals to make health decisions. Individuals own and manage the information in the PHR, which comes from healthcare providers and the individual. The PHR is maintained in a secure and private environment, with the individual determining rights of access. The PHR does not replace the legal record of any provider.

Functionality (as prescribed by AHIMA)

- Aids the transition from paper to electronic record-keeping
- Addresses the major issues of health literacy skills (reading and writing) in the context of culture and language
- Allows selective retrieval and formatting of information by individuals or agents
- Is portable (remains with the individual)
- Helps the individual organize personal health information
- Educates the individual about personal health information
- Assists the individual with decision making and health management and wellness (e.g., reminders of health activities, health risk assessments, and public health and patient safety alerts)
- Is flexible and expandable to support evolving health needs of the individual and family

Completion of the PHR generates tailored preventive care plans, identifying individual recommendations for preventable diseases and medical conditions.

Individual recommendations are supported by physician video counseling, incorporating evidence-based practices specific to the individual's personal risks, age, gender, family history and ethnicity.

- ▶ **iLearn** = Multimedia health lessons and quizzes are delivered as part of the system that analyzes PHA and preventive health risks to create a prioritized, self-paced Personal Wellness Program. The Personal Wellness Program is composed of a series of targeted health lessons generated from the individual's own unique health risks. **iLearn** is the only service of its kind to personalize a wellness program based on each individual user, rather than just serving a list of generic lessons. The customized curriculum is concise, accurate, completely private, and ready for delivery in real time through the portal.
- ▶ **iTrack** = Health calculators and health challenges are "edutainment" activities designed to teach, instill, and reinforce new behaviors. These are referenced through online completion of the PHA, as well as in **iManage** and **iLearn** activities.

- ▶ **iConnect** = Health professionals moderate discussion groups that encourage individuals to ask questions and interact with others who share health and lifestyle improvement goals. iConnect groups foster “idea spaces” of imagination, intuition and insight where sharing leads to new ideas for change (Ogle, 2008). In a digitally interconnected communication forum, change happens more quickly and successfully.

- ▶ **Health Information**

Searchable health content is provided through the Healthwise® Knowledgebase. This gold-standard of health information helps people make better health decisions. The Healthwise® Knowledgebase contains more than 6,000 evidence-based topics on health conditions, medical tests and procedures, medications, and everyday health and wellness issues. The Knowledgebase is created through a proprietary content development process that seeks out the best evidence-based information on every medical issue.

Daily health news and Health Tips are provided by HealthDay and Healthwise®. Award-winning reporters and health writers produce up to 15 stories on weekdays and four stories on Saturdays and Sundays. These articles cover the latest developments in medicine and health, based on primary sources and interviews with medical researchers and experts.

HEALTH SCREENING

Health screening can be an important part of the benefit offering to the Commonwealth's employees. Gordian will work with the Commonwealth to meet your goals and objectives for biometric health screening events. We can develop appropriate communication to disseminate to employees regarding the screening process, facilitate scheduling and manage the actual screenings.

Standard biometric measures collected during the screening process include:

- Height
- Weight
- Body fat
- Blood pressure
- HDL
- LDL
- Total cholesterol
- Triglycerides
- Glucose
- Resting pulse
- Waist circumference

Screening participants receive immediate counseling regarding their biometric screening results. Information is provided on the recommended values and lifestyle habits that affect the health variables. The time per participant is 15 to 18 minutes and includes the screening and health counseling. All tests are conducted with a team of experienced health professionals. The testing program is delivered in a manner that will meet program objectives and quality expectations.

Following the screening data collection a comprehensive data file will be sent to Gordian for import. The lab values will be merged with the PHA. The participants' biometric values will be integrated into Gordian's system. This information, in conjunction with PHA and program results data, will ensure comprehensive information management and targeted program success.

MANAGEMENT REPORTING

One of the services that distinguish Gordian from its competitors is our comprehensive Managed Prevention Tracking System (MPTS). Through a series of reports, the client can clearly analyze program efficacy, identify any areas where an increase in effectiveness is desired, and adjust the program features accordingly to manage program outcomes. Reports are not available in real-time, but a PDF version of the report can be made available on the Internet.

GORDIAN PROVIDES THE FOLLOWING HEALTH RISK ASSESSMENT REPORTS FOR MANAGEMENT:

Graphic Group Summary Report:

This comprehensive group report identifies unique risk concerns utilizing various pie and bar chart combinations. Graphs for the following risk categories are prominently displayed:

- Health risk status of participating group
- Demographics (age groups by gender)
- Risk factors that contribute to deaths in the participating group
- Preventable deaths by disease category
- Benchmarked against Healthy People 2010 standards and Gordian's book of business with respect to smoking, obesity, lack of exercise, high blood pressure, high cholesterol, use of seatbelts, exceeds guidelines for alcohol consumption, and women's health issues (mammograms and pap smears)

The visual element provides additional impact to the wealth of information included in this report. The Graphic Group Report also contains narrative text with additional detailed information. One Graphic Group Report is included with the Personal Health Analysis. Additional group reports are available at an additional cost.

Response Group Summary Report:

This report provides an aggregate analysis of responses for all relevant fields (excluding data strings) included in the Personal Health Analysis. For each question, the total number of valid and missing responses is listed, accompanied by a useful graphic representation of percentages for each response.

MANAGEMENT REPORTING

Group Progress Report:

This report also provides an aggregate analysis of responses for all relevant fields (excluding data strings) included in the Personal Health Analysis. For each question, the total number of valid and missing responses is listed, accompanied by a useful graphic representation of percentages for each response. The Group Progress Report also provides clinically relevant change statistics for each category summarized; for example, T1-T2 respondents whose total cholesterol changed ± 10 mg/dl are labeled as more or less healthy, respectively, and those with less than 10mg/dl change are listed as having stayed the same from T1 to T2.

THE FOLLOWING MANAGEMENT REPORTS ARE PROVIDED AS PART OF GORDIAN'S HEALTH COACHING PROGRAMS.

Member Activity Summary

This report indicates the count of distinct members who took a PHA, stratified for a coaching program, enrolled in a coaching program, are currently enrolled in a coaching program, or have completed a coaching program.

Program Activity (Activity Summary by Program and Package)

This report summarizes the count of unique members who stratified or enrolled in a chronic Condition or Lifestyle Coaching programs where program names are identified.

Goal Achievement Analysis

This analysis provides the count of distinct members who have successfully met their goals or made progress to reduce risk factors through the program.

Program Satisfaction Report

Gordian contracts with Walker Information (Indianapolis, Indiana) to conduct program satisfaction surveys. Client level reports are generated quarterly. These responses can be used by the Account Manager to identify thematic issues for future program optimization, and by the client in promoting the program internally (e.g., success stories).

MANAGEMENT REPORTING

The overall program satisfaction measurement is determined from the proportion of the population agreeing with the statement: *“Overall, I am satisfied with the health coaching program.”*

Performance guarantees for delivery of reports and data may be available upon request and mutual agreement between Gordian and the Commonwealth. Please see the Finance Proposals section of this document for additional details on performance standards and fees at risk.

FEE STRUCTURE

REDACTED.