

THE WELLNESS COUNCIL OF AMERICA PRESENTS



Case Study



The Best Care Is
SELF-CARE!

A Beverage Company

A WELCOA Self-Care Case Study


 The logo features the word "WELCOA" in a small, bold, sans-serif font with a yellow star above the "E". Below it, the words "Case Study" are written in a large, light gray, sans-serif font.


ABOUT **COLLEEN REILLY MBA, MSM**

President & Founder • Total Well-Being

Colleen Reilly is the president and founder of Total Well-Being, a holistic wellness provider that offers services for achieving physical, financial, personal and professional wellness goals. She develops wellness programming and benefits for clients, with the overarching goal of improving employee health and well-being. Ms. Reilly's consulting provides clients with strategic health and productivity goals and objectives, including HRA strategies. She has collaborated with over 60 Fortune 500 clients, helping them organize and implement effective wellness programs.



ABOUT **DAVID HUNNICUTT PHD**

CEO, WELCOA

Since his arrival at WELCOA in 1995, David Hunnicutt has interviewed hundreds of the most influential business and health leaders in America. Known for his ability to make complex issues easier to understand, David has a proven track record of asking the right questions and getting straight answers. As a result of his efforts, David's expert interviews have been widely-published and read by workplace wellness practitioners across the country.

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ABOUT **WELCOA**

Wellness Council of America (WELCOA) was established as a national not-for-profit organization in the mid 1980s through the efforts of a number of forward-thinking business and health leaders. Drawing on the vision originally set forth by William Kizer, Sr., Chairman Emeritus of Central States Indemnity, and WELCOA founding Directors that included Dr. Louis Sullivan, former Secretary of Health and Human Services, and Warren Buffett, Chairman of Berkshire Hathaway, WELCOA has helped influence the face of workplace wellness in the U.S.

Today, WELCOA has become one of the most respected resources for workplace wellness in America. With a membership in excess of 4,000 organizations, WELCOA is dedicated to improving the health and well-being of all working Americans. Located in America's heartland, WELCOA makes its national headquarters in one of America's healthiest business communities—Omaha, NE.

Introduction

What Is Self-Care?

- › Empowerment for managing a healthy lifestyle and knowing the importance of getting preventive care
- › Knowing when to treat common illness or minor injuries at home and when to get medical attention
- › Knowing how to communicate effectively with doctors and other caregivers
- › Being prepared to respond effectively in an emergency
- › Knowing how to achieve a higher quality of life even when you have a serious illness or an ongoing medical condition
- › Seeing yourself as the most important member of your health care team

Self-Care Programs And Workplace Wellness

Employees are bound to get sick or injured, even with the most rigorous wellness programs and preventive measures in place. The result can be costly to both the employer and employee in terms of unnecessary health care utilization and lost productivity.

To address this predicament, organizations of all kinds are rapidly integrating medical self-care initiatives to help employees and their families make informed choices concerning the prevention, detection, initial treatment and follow-up of minor, self-limiting medical conditions.

Within the context of any given workplace, a medical self-care initiative has the power to help employees not only manage their own health and health care, but to become better and more responsible consumers of health care as well.

With the economic realities of rising health care costs, increases in company-sponsored insurance premiums, and the over-utilization of medical visits, a well-designed, effectively-integrated, workplace-based medical self-care program can be the solution that American businesses need. Medical self-care programs are win-win—in that they help employers contain escalating costs and engage employees in the medical decision-making process while empowering them to get the best care possible.

Building An Effective Medical Self-Care Program In Three Simple Phases

Overall, a results-oriented medical self-care program will get your employees actively involved in their own health and acting as advocates for quality medical care. A workplace self-care program is most effective when it is implemented in three phases:

Phase I: Collecting And Contacting

The goal of phase one in a results-oriented medical self-care program should involve employees collecting their health information in one place and contacting a primary care provider. In the initial stages of a self-care program, it's important to have your employees maintain their personal health information in an organized, secure format. Offer them advice for securing a health care provider that will meet their needs.

Phase II: Recognizing And Reacting

In the second phase of a results-oriented self-care program, the goal is to help your employees learn how to recognize their medical symptoms and react appropriately. A self-care book or manual is usually the best tool to offer sound advice for the prevention, management, and appropriate treatment of some common health issues that your employees will face. Medical self-care manuals are designed to help your employees and their family members determine whether

their symptoms can be treated at home or if they should seek medical care. Teaching such skills helps your employees take better care of their health and reduces the costs associated with unnecessary health care visits.

Phase III: Preparing And Performing

The third phase of a self-care program should help your employees build the skills they need to be prepared for their interaction with the medical system. This will ensure that they receive the best care possible from the health system by making decisions as informed, medical consumers.

The Case Of A Beverage Company

The following case study focuses on a large beverage manufacturing company in the United States and how they implemented a medical self-care program that effectively improved employee health knowledge and saved the company a significant amount in unnecessary health care costs.

This organization's story paints a comprehensive picture of how to implement the first and second phases of a results-oriented medical self-care initiative. In Phase I, this company had employees collect their health information in one place and contact a primary care provider. Phase II included a programming component to help employees learn to recognize health symptoms and react appropriately to get the treatment they need. The following case study explains how this large company with three manufacturing plants delivered self-care training to nearly every employee. Outlined here are the self-care program specifics that were used, including: the chosen incentives, employee education, and programming details that sustained the 12-month campaign.

Please note: In an effort to share this information anonymously, the employer documented in this case study will be referred to simply as "A Beverage Company," or "ABC."

ABC is a large manufacturing company in the beverage industry. With 5000 employees, ABC is headquartered in the western United States and runs two additional plants in the south. Manufacturing operations happen 24 hours a day, 7 days a week, 365 days a year, with a racially and ethnically diverse workforce. Over 75% of the workforce is male with an average age of 44 years old and an average tenure of 25 years of service.

ABC's medical self-care initiative, which took place in July of 2003, is a shining example of how such worksite wellness programs can help employees learn to be better advocates for their own health—and contain company costs by reducing unnecessary use of the health care system.

The Plan: How Did They Do It?

A Strong Wellness Culture

ABC's wellness program has been an integral part of the company's corporate culture for more than 30 years. With increasing health care costs plaguing the company annually, the senior level support for a medical self-care program was very high.

ABC was an early adopter of a higher deductible plan and Health Reimbursement Account with their healthcare provider. The motivation for implementing the medical self-care program was to help build a population of informed health consumers so that as the benefit plan changed, employees could learn how to use their health care plan more effectively.

Setting Company Priorities

The most critical piece contributing to ABC's medical self-care program success was that the leaders allowed the wellness staff to use half of the Environmental Health & Safety (EHS) meeting for the *Guide to Self-Care* program. This was a very "loud" statement since the company embraces a very strong safety culture, and at that time of the program launch, was celebrating over 100 days with no accidents or injuries. By giving part of the required EHS meeting to wellness, it illustrated to employees that being well and healthy is just as important a part of the culture as safety.

It took about one month to conceptualize the program. The Wellness Team then presented the plan to the benefits team and got immediate approval. However, the actual implementation took an additional 4-8 weeks due to one-on-one meetings with the ABC Operations and Plant Safety leaders. Without their support and invitation to attend the already-existing mandatory EHS meetings, the program would not have succeeded.

Countdown To Program Launch

The challenge for the ABC Wellness Center staff was to positively impact the overall health of employees and prevent avoidable ER visits without increasing staff or financial resources.

As with any program, the Wellness Team first designed a project plan. The team defined the program and established goals, plans, incentives, materials, marketing and communications, evaluations and budget. By establishing the following goals, ABC Wellness staff were able to launch a targeted program.

Self-Care Program Goals:

- A.** To deliver the *Mayo Clinic Guide to Self-Care* to **75% of eligible employees**
- B.** **90% of manufacturing employees** will attend the mandatory Environmental Health & Safety meetings and learn about the *Guide to Self-Care*

ABC SELF-CARE PROGRAM

Launch Specifics

- › The program gets approved by the Benefits Department
- › The Environmental Health & Safety team allows the Wellness Team to use 30 minutes of the 60 minutes during their mandatory monthly meetings.
- › All ABC Operations Leaders understand the why of the program and show visible support while using half of the monthly Environmental Health & Safety meetings to educate the population on self-care.
- › The Guides are delivered to employees when they attend the mandatory Environmental Health & Safety meetings.
- › Welcome letters are printed by Wellness staff and handed out along with the books. These letters encourage employees to share the self-care guide with their spouse. Coordinator resources and copies are sent to each ABC plant location.
- › Wellness staff add the self-care program description to the e-health portal.
- › Wellness staff create and post a bulletin board in the Wellness Center and within all break rooms throughout the company. Colorful paper and helium balloons were attached to bulletin boards to capture attention.
- › Program information is posted on bulletin boards in 6 buildings in high-traffic areas—boards are made very visible with bright colors to call attention to take-away information for employees.
- › Guide to Self-Care (GSC) presentations were scheduled over a 2-month period during the existing Environmental Health & Safety (EHS) team meetings
- › The self-care scenarios (See page 8) are conducted during GSC training (hosted during the EHS meetings), and prizes from health and dental vendors are provided.
- › The evaluation survey is distributed at the conclusion of the program and manually tallied by the wellness staff.
- › The "Practicing Self-Care" contest for employee testimonials is posted in the monthly ABC newsletter and submissions are sent to the Wellness Center. For three months, winners are announced and highlighted on the Wellness Center bulletin boards and receive \$100 gift cards to the local grocery store, or a first aid kit.
- › The program is communicated at the Wellness Center through flyers, posters, and table tents.

- C. **50% of corporate employees** will attend the voluntary Lunch & Learn meetings
- D. **80% of survey respondents** will agree that the Guide will be useful to them and their family members.

Program Design

ABC's self-care program focused on the distribution and training of the *Mayo Clinic EmbodyHealth Guide to Self-Care*.

The distribution of the *Guide* was accomplished through:

- › Wellness staff attending mandatory monthly Environmental Health & Safety Meetings.
- › Wellness staff hosting optional Lunch & Learn meetings for corporate staff

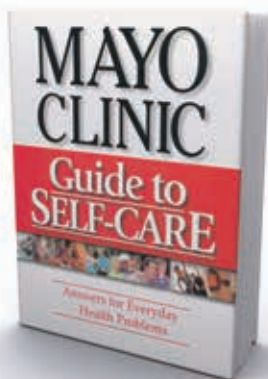
During the meetings, each employee received their *Guide to Self-Care*. Each meeting was mandatory as it was part of the Environmental Health & Safety monthly meetings. There were four parts to the program:

Components Occuring During Mandatory Meetings

1. 30-minute overview of the *Guide to Self-Care*
2. Scenario quizzes with raffle prizes

Components Occuring 6-12 Months After Mandatory Meetings

3. "Practicing Self-Care" contest
4. Follow up survey to evaluate usefulness of the book



DRILLING DOWN: ABC's Communication Plan

ABC's wellness team knew their population and what communication vehicles could maximize the impact. When developing their communication plan they focused on five key things:

- 1. Custom and general communication to reach a broad audience.** This company used customizable channels such as phone calls and one-on-one meetings, as this was the most effective and would produce the greatest impact on preventive medicine participation. However, these were more expensive in terms of time and resource allocation so lower-cost communication vehicles were also used such as general media and mail. The variety of delivery channels proved to be the most effective for hitting the greatest number of people across the organization and piquing their interest in the program.
- 2. Fact-filled messages for personal communications.** This company used fact-filled messaging for the personal phone calls and for the one-on-one meetings, as it was credible and helped build trust in the program. Most of the personal meetings were with leaders to gain buy-in for the program, which allowed it to be sponsored on company time.
- 3. Humor messages for gaining attention.** The company used more humor messaging for gaining attention. This promotional tactic was to build awareness, gain attention, and broadcast to the mass population that this program was coming and they should attend.
- 4. Stories for behavior change.** Testimonials worked really well within this organization, especially since the average tenure of each employee was 20 years. These employees knew each other well and respected each other, so if one person had a personal success with their health, everyone would listen and try to learn how they could adapt that to their life. These types of personal stories were used pre-program, during the program, and post-program.
- 5. Educating with content.** Employees within this organization responded to content that spoke directly to their wishes and concerns. Knowledge of employees' motivation for participation in health behavior-related activities allowed the company to develop content that resonated with their workforce, thereby influencing participation. The wellness staff knew their population and realized that messages that affirm the direct connection between improvements or "gains" in one's health and participation in preventive medicine events would have the most influence on employees. Additional non-threatening messaging was much more effective for this population. Lastly, due to the demographics of this population, the three key factors that employees responded to were: the key messaging of improving one's health; looking bigger, or more muscular; and saving money. The term "Informed Health Consumer" did not resonate, even though that is what they were doing through this educational program.

The Particulars: Key Components

The next section of the case study takes a look at specific elements that were involved in delivering ABC's self-care campaign. ABC's actual self-care program was about 6 months long. This included the 2 months of meetings and 3 months of post communications about how employees were using the book. Along the way, the following details are what made the program work:

Incentives

The actual book was the first incentive for participating in the program. Also, during the training, employees had the opportunity to win fun prizes if they actively participated and answered self-care scenario questions. Prizes were donated by the health and dental vendors and included tooth brushes, floss, tennis shoe gift cards, and more. The third incentive opportunity was a gift card to a local grocery store or a very nice first aid kit if the employee shared a testimonial of how they used the self-care book.

Budget

The cost for the program was as follows (and does not include the time for staff resources):

The cost of the self-care guide was \$5 per book, the raffle prizes during the training sessions were donated, and the \$1000 was spent on the incentives for testimonials.

Budget breakdown:

- › 5000 self-care books with shipping & handling (plus individual mailing to remote employees): **\$5 per book**
- › Printing costs for welcome letters: **\$180**
- › Contest prizes: **\$1,000**
- › **TOTAL: \$26,180.00**

“MAKE THE TRAINING PRACTICAL AND USEFUL—SHOW THEM THEY CAN DO IT”

ABC chose realistic but memorable scenarios and messages for their Guide to Self-Care training sessions. Here are some examples of ABC's Phase II messaging:

Appendicitis Or Indigestion?

A story was shared about a man who went out and had spicy Mexican food for dinner and then went to bed. He awoke with a stomach ache and thought it was appendicitis, but by first checking in the *Guide to Self-Care*, the man discovered he actually had indigestion and avoided going to the ER in middle of the night. The plant workers could relate to this story because theirs was a lifestyle of not eating well & drinking at night—many of them having an 'Aha!' moment as they realized they, too, had done this and could have just had a drink of water, taken an antacid, and gone back to bed.

Debilitating Foot Pain

Another scenario about having an ingrown toenail was shared with these employees, predominantly men, who work on their feet all day. Many of them could relate to the discomfort of having something wrong with their foot, but not wanting to miss a day of work because of the pain, so they'd go to the doctor or ER right away. They were relieved to know they could look in the book and find a home remedy as simple as “soak your foot.” The Wellness Team learned that the bottom line is: most people don't trust themselves to handle “medical” symptoms—but if you equip them with a good resource, they'll feel empowered to take care of themselves.

Don't Put It On The Shelf

Communicate how they'll use the self-care guide and reinforce the vision for using it at home. ABC offered reminders for the employees to “put it where you'll see it—don't put it up on a shelf.” They encouraged employees not to keep it at work, but to take it home and talk about it with a spouse, even suggesting that employees should keep their self-care guides in the kitchen: “If you're rolling around in abdominal pain, your spouse will need to get it so she can help you!”

Selecting The Right Guide

The *Mayo Clinic Guide to Self-Care* was selected because ABC was using the *Mayo Clinic EmbodyHealth* (ehealth) Portal at the time, and it was a nice complement. The *Guide* was also customized to drive traffic back to the website.

In addition, ABC felt that because Mayo Clinic is a reputable and world-renowned leader in health and wellness, the Company associates would appreciate receiving a credible, reliable guide that was written by the experts. The *Mayo Clinic EmbodyHealth Guide to Self-Care* is based on decades of patient care experience with millions of people and is specifically designed to help people:

- › **Prevent illness**
- › **Identify health problems before they become serious, costly concerns**
- › **Avoid unnecessary primary care and emergency room visits**
- › **Take a more active role in working in partnership with their health care provider**

Initial Participation Rates

Participation was defined as the number of people that received the book and attended the training meetings. Engagement was defined by the number of participants that completed the testimonial competition.

Nearly 90% of the 5000 employees received the *Guide to Self-Care* by attending their mandatory Environmental Health & Safety meeting. After the training sessions were over, about 500 employees shared their testimonials of use of the program.

The self-care program was not available to spouses, but an important part of the program was encouraging employees to take the book home and share it with a spouse or family member. Associates were also encouraged to share their family

testimonials of using the book and could win prizes for doing so.

Data Collection & Timeframe

During the annual health screening and health assessment, the wellness staff identified employee risk factors in the categories of high blood pressure, high cholesterol, high BMI and smoking. In addition, cardiovascular conditions were the fourth highest cost in health claims at ABC. This data helped the wellness and benefits team to collaboratively design a primary and secondary prevention program that would have an opportunity to impact employee lifestyle choices and corporate health care spending. The first program was the *Guide to Self-Care* program, but a subsequent more targeted program developed out of the GSC program and Health Assessment data. It was called Cardiovascular Health Improvement Program or CHIP.

Tangible Results Of The Self-Care Program

The most critical result of the *Guide to Self-Care* was the extension and further planning and development of a Cardiovascular Health Improvement Program (CHIP) program. The tailored CHIP program resulted in reduction in cardiovascular conditions caused/exacerbated by poor lifestyle habits.

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Getting Connected With Employees

ABC wanted to implement a consumer-driven health care plan that had a high deductible. Therefore, they felt they needed to give employees the building blocks and a foundation to become aware of what's available to them and how to use the new plan effectively. The education campaign consisted of providing a Health Assessment and driving traffic through the onsite clinic. ABC's Wellness Team encouraged employees to "know their numbers" by getting a print-out of their Health Assessment results, and taking that information to the doctors in the on-site clinic. The population-wide results showed that ABC had more areas of need—and helped the Wellness Team decide where to focus their efforts next. ABC began with this strategy to help its employees become more informed and capable—to be able to take ownership for their health and health care decisions.

The *Guide To Self-Care* program had a captive audience because they did trainings at mandated meetings. These self-care trainings had a major impact on the population, and both the employees and the Wellness Team learned so much while building relationships. (Previously, the Wellness Team had typically stayed in the Wellness Center and hoped the employees would come to them for the message, but once they got OUT to the plant and the mandatory meetings, their eyes were opened to those employees who really needed help.)

Moving From A Generalized To Targeted Approach

The self-care program was one thing, but when the Wellness Team drilled down on its higher risk population, it imagined how much more could be taught in a more targeted or one-on-one wellness initiative. So when the self-care program ended, the Wellness Team capitalized on the self-care relationship they had established to provide their most at-risk employees with a targeted wellness service.

“A KEY ASPECT TO KEEP YOUR SELF-CARE PROGRAM ALIVE—AND HELP EMPLOYEES ALONG THE WAY—IS TO CREATE A SIMPLE PROCESS FOR THEM TO REMEMBER!”

ABC developed the “4 R’s” to help employees keep the self-care program top-of-mind.

1. **Responsibility** means that you are in charge of your health and need to be accountable for the decisions you make regarding your health care needs.
2. **Reporting** refers to telling your health care provider accurate details of self-tests and observations you have kept track of.
3. **Recording** means writing down pertinent information and any instructions your provider gives you.
4. **Requesting** means you ask your provider questions to find out what you need to know about your condition, what treatment is recommended, success rates, risks, other things you can do to take care of your condition at home.

The bottom line is to help your employees understand that they have a right to seek information about their health from their physician visit, and they should not leave the issue at rest until they fully understand what to do.

The Wellness staff followed up with 906 employees that fell into a very high cardiovascular risk pool based on the screening and assessment results. This group of employees not only went through the health assessment and screening, but had also attended the *Guide to Self-Care* program, and now it was time for a targeted approach for this group. They were invited into a high-touch, 8-week CHIP program program with a 4-month and 10-month follow up. A total of 77 participants finished the CHIP program, on average completing 14 out of 16 sessions. The CHIP evaluation data showed that 80% of the participants demonstrated an increase in functional capacity, 56% showed a decrease in total cholesterol, and 44% showed a decrease in body mass. More importantly

to the practitioners, 84% stated the education sessions were beneficial, and 100% said the program helped them make positive lifestyle changes. The *Guide to Self-Care* was the first program that started their personal journey of becoming more accountable and informed on how to take control of their own health. It was mentioned by many of the participants that having a wellness staff member come out to the plant and build a personal relationship with them helped them decide to join the CHIP program. Relationships and trust within this population was paramount for success.

The Pay-Off: Results Of The Program

This section contains program results and outcomes from ABC's self-care program. Despite some challenges, ABC's Wellness staff saw the following benefits as a result of their self-care initiative:

- › Reaching out to and providing all employees with information to help empower them and give them skills to take charge of their health
- › A touch point that connected lifestyle choices with personal health and health care costs
- › Educating employees about being informed health care consumers and how that could help them save money with the new benefit plan design
- › A program that the employees could share with and that would benefit their spouses and families
- › The visible support from company leadership that the culture of wellness was as important as the culture of safety

“CREATE A SHORT AND LONG TERM WELLNESS STRATEGY.”

Just like any business initiative, you need a short and long term strategy. It is imperative that it aligns with the business and operational goals of the company. For example, in ABC's Wellness program, the main corporate initiatives included: providing employees with good wellness practices and benefits; creating a culture of health; and saving on health care costs.

ABC's long term strategy to get the health care costs under control was to implement an HDHP, provide education on becoming a more informed health consumer, and change people's behavior over time. Some of the imperative tactics used for this strategy included:

- getting visible senior leadership involvement
- designing meaningful incentives
- communicating constantly and consistently in a multimodal approach

In this case, the short term strategy (to support the overarching long term strategy) was to gather data, use that data to drive program interventions, and then evaluate and refine annually. Specifically your company could:

- offer a health screening and health assessment to capture the data for your population
- evaluate and look at your top health and medical claims and costs
- use this data to prioritize what programs you should implement based on your population's needs and wants



Perfect Timing For A New Benefits Plan

ABC's self-care program was timely, as the company had just implemented a higher deductible plan with a Health Reimbursement Account. Preventive care on that program was covered 100%. The change in the benefits plan (to the HDHP/HRA) helped associates and their families to understand the importance of regular preventive care visits. It also helped them realize they could save money by utilizing a self-care book and not just rushing to the Emergency Room.

Post-Program Reflection

If they could have done things differently, ABC's Wellness Team wishes they would have partnered with the Benefits team as closely as they partnered with the Environmental Health and Safety Team. They also wish they would have had the Benefits team pull the ICD-9 Codes from the health care plans for preventive care visits, ER visits and Urgent Care visits both pre- and post- program. This would have helped them with tangible outcome reporting other than just participation, engagement and positive testimonial stories.

In addition, ABC had an onsite medical center, and the Wellness Team thought it should have integrated the self-care program further into the onsite clinic. *The Guide to Self-Care* was available for employees in the waiting room, but the Wellness Team wishes they had better trained the doctors—making the physician visit more of a teachable moment for employees and their spouses to receive reinforcement about all aspects of the wellness program and the *Guide to Self-Care*.

ABC's Reasons For Self-Care Success!

- › Piggy-Backing On Mandatory Health & Safety Meetings
- › Senior Leadership Support
- › Communication



A Lifelong Impact

Overall, ABC's medical self-care initiative had a very positive impact on most of its employees—and not just because of the cost savings or reduction in ER co-pays—but because they felt that their employer cared for their well-being.

Employees were able to take the Guide to Self-Care home and discuss it with their spouse or family members, which generated conversations and helped individuals become informed health care consumers. Thanks to the program, ABC's workers were empowered with the knowledge, skills, strategy and tools necessary to take charge of their personal health—for life! **SCS**

What NOT To Do: Advice Learned The Hard Way

Don't Limit Your Communications

As ABC began its self-care program promotions, they launched through the corporate communications department first—only to realize that operations groups & administrative areas each had their own communications department. It was these customized, departmental communications—often newsletters and memos from the division leaders—that employees were reading the most. ABC's Wellness Team decided to capitalize on all modes (not just those from the corporate office), and the effect was that they could reach more people and ultimately had success!

Self-Care Programs Never Have To End

A big challenge for ABC was continuing to sustain employee engagement and commitment to the program and to their personal health. The Wellness Team started out with high participation in the training programs, but felt it didn't have enough touch points to sustain adequate use of the book. Keep your employees engaged by refreshing scenarios and self-care trainings. Keep the program alive in some form or fashion—remind people that they have the book so it doesn't go up on the shelf, never to be seen again.

You Can't Manage What You Can't Measure

ABC's Wellness Team regrets that they didn't do a full ROI assessment, and encourages those who are starting self-care programs to pull the data on urgent care, ER, and preventive care visits—both pre- and post-program—in order to do so. This data helps solidify the support for your program(s) and is important so that you'll know when and how people are changing their behavior.





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