

Case Study

Healthy Workplace Programs
at American Express Canada

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Introduction

This case study is one of a series of twelve such studies conducted by the Canadian Labour and Business Centre during 2001 – 2002.

Issues of workplace health and wellness are an ongoing priority for the Centre, which is a joint organization founded on strong membership from the main workplace parties – business and labour. We believe that approaches which promote workplace health and wellness are in the best interests of both employers and workers – a clear ‘win-win’. In particular, in a period of anticipated growing skill shortages, those employers who pay attention to workplace health issues will have a competitive advantage over others in recruiting and retaining workers with much-needed skills.

The following case study reflects the Centre’s main objective in undertaking this work, namely:

- To identify the key features of the wellness initiatives in each workplace;
- To document the role of both management and unions/workers in managing these initiatives;
- To assess the relationship between the initiatives and the organization’s business strategy and ‘culture’; and
- To document the ways in which the workplace monitors the impacts of its health/wellness activities.

In short, the case studies are as much about the process of workplace wellness as about the content and impacts of individual workplaces’ initiatives.

Taken as a group, the full set of cases has been deliberately assembled to reflect, as widely as possible, a broad diversity of workplaces in terms of geography, sector, size, and union/non-union status. As a group, the cases are intended to tap the experience and practice of a variety of workplaces, in order to maximize the benefit from the case study work. Readers will note, as a result, that no two cases are alike, and that the lessons to be learned from each case vary considerably.

The full set of case studies will be available on the Centre’s website at www.clbc.ca, where they will be published individually. The Centre is also preparing a summary commentary on the cases, which will identify key common features – and important differences – among them. Finally, the Centre is developing a series of regional seminars at which some of the workplaces featured in these case studies will share their experiences. As they are scheduled, the seminars will also be listed on the CLBC website.

The Canadian Labour and Business Centre welcomes readers’ comments and questions, which may be communicated to the Centre at (613) 234-0505, or to info@clbc.ca

Healthy Workplace Programs at Amex Canada

- *Amex Canada Inc. is a wholly owned subsidiary of U.S.-based American Express Company providing travel and financial services. It is non-unionized and has approximately 3,700 employees.*
- *A key element of the company's business strategy is to become a "top 25 employer." There is a deeply rooted cultural belief that satisfied employees mean satisfied customers, which mean better business results.*
- *Senior managers believe that the healthy workplace program has contributed significantly to employee satisfaction.*
- *A myriad of wellness activities is offered at the company. A key structure is the fitness centre, which organizes the majority of the activities.*
- *Employee involvement in decision-making around wellness programs occurs mainly through survey mechanisms and feedback meetings with managers.*
- *Participation in the activities is substantial, satisfaction with the programs is at a high level, and the overall employee satisfaction level is high. For senior managers, these data provide sufficient proof of the worth of the program.*

I. Context

Amex Canada Inc. provides travel and financial services. A wholly-owned subsidiary of the U.S.-based American Express Company, it has been operating in Canada for about 150 years. It employs about 3,700 non-unionized workers, 2,100 of whom are located at the firm's Markham facility. The vast majority of the Markham employees, 80 percent, work in the call centre.

The company is organized around six businesses:

- its consumer credit card business;
- a corporate credit card business;
- a consumer travel business;
- a corporate travel business;
- a financial services business; and
- its merchant business, that is, the business relationships it has with firms that use the Amex card.

Amex Canada has revenues in excess of \$600 million annually and it has two and a half million charge and credit cards in force. Since 1997, the company has improved its profitability by 500 percent, doubled its customer base and added 800 jobs.

The company has been recognized in a number of ways. It:¹

- received the Canada Award for Excellence from the National Quality Institute in 1998;
- was listed in the 2001 and 2002 editions of Canada's Top 100 Employers by author, Richard Yerema;
- was included in Report on Business magazine's 2001 list of the Best 35 companies in Canada to work for and its 2002 Best 50 companies in Canada to work for; and
- received the Employment Equity Merit Award from Human Resources Development Canada in February 2001.

In 2001, Amex received another award from the National Quality Institute; this one the Institute's Healthy Workplace Award.

The average age of the employees is in the late thirties. The tenure of the firm's employees is as follows:

- 0 - 1 year - 20 percent of employees;
- 1 - 3 years - 25 percent of employees;
- 3 - 5 years - 20 percent of employees;
- 5 - 10 years - 12 percent of employees;
- more than 10 years - 23 percent of employees.

The gender make-up of the work force is 67 percent female and 33 percent male.

In the early 1990s, the company set out a statement of values. It reads as follows:

“All our activities and decisions must be based on, and guided by, these values:

- placing the interests of clients and customers first;
- a continuous quest for quality in everything we do;
- treating our people with respect and dignity;
- conduct that reflects the highest standards of integrity;

¹ Amex Canada Inc., Report on Healthy Workplace Programs, 2001, p. 1.

- teamwork – from the smallest unit to the enterprise as a whole; and
- being good citizens in the communities in which we live and work.”

These core values have become known as the Blue Box Values.

II. Impetus for Healthy Workplace Initiatives

In comparison with the business strategy formulated in 1996, the current strategy that guides the company is considerably more sophisticated. In that year, the Amex managers established a five-year strategy with a simple goal: to reach \$100 million in pre-tax income by the year 2000. Toward the end of 1998, it became clear that the company would attain that goal well ahead of schedule. They, therefore, began work on the next strategy.

What eventually emerged was called Formula for Growth. It sets out three objectives for the company. Unless an activity is in support of one or more of the following objectives, it will not be undertaken or it will be cancelled:

- to provide excellence in quality and service; among the sub-goals are to deliver instant customer service such as on-line card application and approval, and to gain 100 percent card member access at bank machines;
- to deepen customer relationships; among the sub-goals are to gain 10 percent to 12 percent of the credit/charge card market, and to gain 30 percent of the corporate travel market;
- to become a top 25 employer; this objective has six elements:
 1. Tools to do the Job – ensuring that employees have the tools to do their jobs effectively and efficiently;
 2. Sharing in our Success – the company continuously reviews its benefits plan to ensure it meets employee needs; in 2000, for instance, the company introduced an employee stock ownership plan;
 3. Developing and Learning – Amex offers continuing education opportunities to support employee professional development;
 4. Recognition – ensuring that rewards and recognition become part of the company's culture; and
 5. Diversity – the company wants a work force that is representative of the diversity in the community and is committed to giving "all employees an equal opportunity to share their thoughts, gifts and talents regardless of

age, race, gender, demonstrated disability or any other individual differences."²

6. Work-Life Balance.

The view among Amex managers is that, by becoming "a great employer" in the above six areas, the company can become a top 25 employer. There is also a deeply rooted cultural belief among Amex managers that satisfied and engaged employees mean satisfied customers which mean better business results. Thus, according to one senior manager, measures intended to enhance employee satisfaction in one or more of the six areas have "a pretty good chance of getting some attention and likelihood of getting a sponsor". A company document makes the same point: "The Company strongly believes having an effective Healthy Workplace Program ... will positively impact the employee constituent and in essence create a productive environment; thereby creating value for customers and shareholders."³ And again:⁴

"Employee satisfaction and well-being means employees will remain loyal and stay with the company. This will lead to customer satisfaction and loyalty. These factors will positively impact the bottom-line, thereby increasing profits and growth, which can be reinvested in employees ..."

This process is known as the "Service Profit Chain Theory", a concept that was developed by a former Vice President at Sears, Tony Rucci.

Not surprisingly, the wellness program found a receptive audience among both managers and employees.

The company's healthy workplace initiatives fall primarily within the Work-Life Balance component of becoming a top 25 employer. Their direct link to one of the three Formula for Growth objectives is thus clear and explicit.

² *Ibid.*, p. 3.

³ *Ibid.*, p. 3.

⁴ *Ibid.*, p. 11.

III. Overall Wellness Activities

1. Work-Life Balance

Work-life balance is seen as central to employees' control over their lives and the role of work in their lives. As a result, work organization is highly flexible, and includes:

- part-time work, which enables employees to work fewer than 36.25 hours (which are the full-time hours) per week;
- the virtual office, enabling employees to work from remote locations;
- compressed work weeks, enabling employees to work full-time hours in fewer than five days;
- telecommuting, whereby employees can work from home; in this arrangement, Amex pays for home office set-up for employees who work permanently from home;
- job sharing, which enables two employees to share one job;
- personal leaves of absence, which give employees up to ten weeks of unpaid leave for personal reasons;
- paid sabbaticals, which give employees from one month to twelve months of paid leave, depending on years of employment; this option is open to employees who want to contribute their skills by educating others or participating in some activity that helps "make the community a better place to live and work."

There is no child care assistance at Amex. The preference among managers is to institute benefits and programs that are of use to as many employees as possible. Child care assistance would benefit only those employees with young children.

2. Wellness Programs, Facilities and Organization

Appendix 1, based on a revised version of the Conference Board of Canada's grid of workplace health initiatives, shows that Amex Canada has programs and activities in all areas of workplace health, with varying degrees of comprehensiveness.

The 30-acre grounds of the Amex Markham facility feature volleyball courts, barbecue pits and picnic benches. The inside of the no-smoking, three-story building has a full-service cafeteria, which offers healthy alternatives to accommodate the dietary needs of all employees. In addition, there are an outdoor patio and terrace, fitness centre, quiet room (for meditation, prayer and reflection), and a variety of health-related facilities, including rest areas, treatment and examination rooms.

A. Organization of Wellness Programs

a) Key Departments in Health, Safety and Wellness

Two company departments play a key role in promoting health, safety and wellness. One is the Facilities Department. It has a Building Engineer and Maintenance Team which ensures that indoor air quality meets or exceeds provincial standards and that workstations and workspaces meet legislated requirements. An Architect ensures that workstations and workspaces meet the employee's ergonomic needs. The Department also partners with the Global Procurement Team to select workstation equipment, which must meet the company's health and safety standards.

The Facilities Department has established a Service Desk. Employees with concerns about their workstations or chairs can contact the Service Desk for appropriate action. The Department also conducts spot inspections of workstations, chairs and equipment to ensure that they are functioning as they are supposed to.

The second is the Health Services Department. It is responsible for the fitness centre and it provides a range of medical services, including allergy and flu shots, blood pressure monitoring, travel profiles, health-care videos, and diet, nutrition and general health-care information. It also conducts ergonomic assessments and preventive hearing loss assessments for employees in high-noise areas.

b) Key Committees in Health, Safety and Wellness

In addition to these departments, the company has the legally required Joint Health and Safety Committee, which reports directly to the Chief Financial Officer. This Committee meets monthly to review relevant occupational health and safety legislation, workplace inspections and incident reports. It also makes recommendations to the company's senior management on health and safety matters.

If, during its monthly inspection, the Committee identifies a hazard, a report is prepared and recommendations are made. This report is sent to the department leader who is asked to address the hazard within a specified time period. A Committee member follows up with another inspection.

B. Programs

Most of the lifestyle and wellness activities of Amex can be grouped into four categories: nutrition, physical activities, the Employee Assistance Program, and health and wellness education.

a) *Nutrition*

- a subsidized full-service cafeteria is on site and open seven days a week, offering healthy and low-fat foods daily;

- Weight Watcher sessions are offered on site;
- nutrition campaigns are held during which prices for nutritious meals are significantly reduced to promote healthy eating;
- nutrition lunch and learn programs are held annually.

(See **Appendix 2** for specific initiatives.)

b) *Physical Activity*

- all employees have access to the fitness centre, which is staffed by certified fitness professionals; the centre is managed by an outside contractor, the Health Systems Group;
- individual fitness evaluations and programs are available to members of the fitness centre;
- bicycle racks are available to encourage employees to use bicycles to get to and leave work;
- walking and running clubs have been established at the facility;
- during the spring and summer months, the fitness centre offers numerous outdoor activity learning sessions, such as golf lessons and rollerblade lessons;
- the company sponsors and promotes employee participation in many charitable fitness events, including the Toronto AIDS Walk and the Ride for Diabetes.

(See **Appendix 2** for specific initiatives.)

c) *Employee Assistance Program*

- the Employee Assistance Program provides counseling on a range of issues, including work-related stress and substance abuse; the Program has been outsourced to Warren Shepell, a firm that specializes in delivering employee assistance programs; it is available to employees and their families.

d) *Health and Wellness Education*

- First Aid/CPR Training is made available to all employees twice a year; certified First Aid and CPR employees also have an opportunity to take Defibrillator Training;
- for third shift workers, the Health Services Department runs lifestyle change programs on shift work;
- videos on a range of health and wellness subjects are available for employee use;
- under its Educational Assistance Program, the company will reimburse employees who receive certification in a health and fitness field, e.g., certification as a Fitness Instructor;

- Joint Health and Safety Committee members have received Code 8 Emergency Response training;
- ergonomic training is available to all employees;
- an annual Health and Fitness Expo is held during which external health and fitness vendors set up displays and provide information on their services and products.

(See **Appendix 2** for specific initiatives.)

A variety of mechanisms are used to inform employees of health, safety and wellness activities, including word-of-mouth, the fitness centre newsletter, e-mail, voice mail, pamphlets (frequently handed out to employees at the entrances), posters, bulletin boards, and the television monitors located throughout the facility.

C. The Fitness Centre

The centrepiece of the company's healthy workplace program is the fitness centre. Most of the above listed initiatives were organized by the fitness centre staff. In addition to providing equipment, it offers a range of fitness and wellness programs, as well as program demonstrations and fitness assessments.

Money for the fitness centre comes from memberships and the company. Employees pay a small membership fee, \$15 per month, while the company provides a subsidy. Financial results for the year, 2000, are shown in **Table 1** below.

Table 1
Financial Results, Fitness Centre, for 2000

	2000
Revenue	\$83,941
Expenses	
Staffing and management	\$97,457
Program expenses	\$51,621
Total expenses	\$149,078
Company contribution	\$65,137

The company has taken out liability insurance on the centre but members do sign a release form to absolve the company of responsibility for any injuries incurred by members.

In its 2000 year-end report, fitness centre managers identified several objectives for the year 2001:

- improve equipment and facilities;
- offer more stress, weight management, massage therapy, and nutrition programs;

- offer self-defense and specialty classes, e.g., belly dancing;
- investigate additional methods of communication with members;
- liaise with Centennial College and George Brown College, re: their Coop Programs;
- ensure compatibility between the philosophy of the fitness centre and that of the company;
- harmonize the fitness centre's programs with the Work-Life Balance component of Formula for Growth.

Employees can use the fitness centre during and outside of their work hours.

D. Ergonomics

Over the last few years, the company has focused attention on ergonomics issues.

The Health Services Department has conducted ergonomic assessments, held ergonomic learning sessions and produced an ergonomics guidebook to generate awareness and change behaviours. As noted earlier, the company purchases workstations that meet its ergonomic standards.

Also, computer monitors have been replaced with new ones that give a sharper image, which reduces eye strain. Laptops with larger screens have also been purchased for ease of use and reduced eye strain.

Some areas of the company's Markham facility are high noise areas. Employees who work in these areas are provided with protective equipment and their hearing is assessed annually.

Through its annual employee survey, the company became aware of concerns regarding indoor air quality. As a result, the air quality is monitored annually and the results are expected to meet or exceed Ontario government standards.

IV. Management Commitment

Management commitment to the healthy workplace initiatives is demonstrated in several ways at Amex. For instance, the company allocates considerable financial resources to the full range of wellness activities, including ergonomic initiatives. Also, the Chief Financial Officer is the executive sponsor of the Joint Health and Safety Committee, while the Vice Presidents of Establishment Services and Risk are the executive sponsors of the Work-Life Balance component of the Formula For Growth strategy. Many executives actively participate in the various healthy workplace services and programs.

Amex also employs a full-time occupational nurse, and contracts the services of a part-time doctor, massage therapist and physiotherapist. Massage therapy and physiotherapy

are covered by the health spending account within the company benefits plan. The benefits plan also includes naturopathic services, orthopedic and chiropractic services.

Financial investments authorized by senior management in 1999 and 2000 include:

- \$800,000 in modular workstations;
- \$115,000 in ergonomic chairs;
- \$250,000 in operating costs for the fitness centre and the Health Services Department (2000);
- \$10,000 for lockers (1999).
- \$30,000 in upgrades to make the Markham facility completely accessible to employees and others with disabilities (2000).

Senior management compensation is dependent on employee, customer and shareholder satisfaction. Each manager sets goals related to employees, customers and shareholders for his/her subordinate managers. There are no specific goals related to health and wellness. The manager's bonus depends on the extent to which the goals have been met.

It is the Vice President of Human Resources who is ultimately accountable for the health, safety and wellness programs at Amex Canada. The occupational nurse and the fitness centre's manager and assistant manager report directly to this Vice President, who is a member of the executive team.

Senior managers have made it common practice to consider employee well being in the decision-making process. When new business opportunities are being studied, senior managers take into account numerous employee-related concerns, including new positions, the hours of operation, the type of work required, and the shifts expected for the positions. According to a company document, the managers "make any necessary adjustments or create programs that will ensure the new business opportunities have a positive impact on employee well being and the overall organization."⁵

The importance of senior management backing of the health and wellness program was emphasized by one middle-level manager interviewed:

“The major key to its [healthy workplace program] ongoing survival has been the senior management support. And my experience in other organizations is that, if you work it from the bottom up, it isn't going to last. If it is being promoted and supported from the top down, then people trust and believe that it's OK to adopt those [health and wellness] practices.”

⁵ *Ibid.*, p. 14.

V. Employee Involvement

Employee involvement in health and wellness activities can be measured on two levels: the degree of employee input into decision-making around wellness programs and the degree of participation in the activities.

a) Employee Involvement in Decision-Making

There are no formal structures at Amex, aside from the legally required Joint Health and Safety Committee, that provide opportunities for employees and managers to discuss and make decisions about health, safety and wellness matters. However, Amex uses a variety of measures that provide managers with data on employee needs and wants and that give employees an opportunity to advance their views on health and wellness issues. So frequently is employee input solicited that one employee described Amex as "a feedback-focused company." Another stated that, "Our culture is a feedback culture. So ... employees don't hesitate to tell us how they feel ...". That includes "telling the President of the company how they feel ...".

As noted earlier, the company conducts an employee survey annually. It contains 106 questions on 12 dimensions: customers and clients; quality; people; job itself; employee development; diversity; manager effectiveness; integrity; meritocracy; employee satisfaction; teamwork; and good citizenship. Health and safety is not among the twelve dimensions but it is dealt with indirectly in many of the questions. Employees also have an opportunity to comment on any issue they would like to. Generally, the response rate to the survey is above 90 percent and the comments are extensive, suggesting that the employees believe that their concerns, ideas and opinions will be received.

Once results are analyzed, employee survey action teams, comprised of managers and employees, are formed to develop action plans and to monitor progress in the implementation of those action plans.

- Another company survey is the health services and fitness centre survey. It measures employee satisfaction with the health and fitness centre services. It is also used to plan future events and activities.
- The employee suggestion program encourages employees to make suggestions to improve business processes and reduce costs. Suggestions are reviewed by a committee of senior managers and employees.
- Employee focus groups are held as needed to obtain input from employees on how Amex can be a top employer.
- "Town hall" meetings, led by the company president, are held quarterly.
- Executive team members hold breakfasts with employees from their business areas to discuss employee issues.

- "We're listening" sessions are held monthly or bi-weekly by vice presidents, directors, and managers with employees to discuss any business-related topic.
- The operator of the Employee Assistance Program, Warren Shepell Corporation, produces reports on program usage. This information is used by the Vice President of Human Resources to make additions or changes to the benefit plan and to the healthy workplace program.
- Absenteeism statistics are reviewed, as are attrition reports (reports based on interviews with those leaving the organization), and the results of both are used in employee planning.
- Finally, since senior managers use the health and fitness facilities and programs, employees are able to discuss issues face-to-face with executives on an ad hoc basis.

b) Employee Participation in Health and Wellness Activities

The numbers appear to demonstrate considerable take-up of the wellness activities and services. The wide range of programs offered is likely one reason for the high take-up rate. According to one employee, who is also one of 14 volunteer fitness instructors, "What's great about Amex and the wellness program is that they try to have programs that are suitable for every level; every age group, every fitness level, every interest level ...". Also, the fitness centre manager points out that, "We offer a lot of seminars and workshops on various topics, *depending on what the feedback is from the employee survey ...*". [Emphasis added.] What the foregoing suggests is that the health and wellness managers at Amex make a serious effort to attract, and are having success at attracting, those who do not normally exercise regularly or practice healthy living habits.

- The on-site fitness centre has capacity for 650 members. It currently has 650 members, up from 500 in January 2000.
- The Health Services Department reports that the massage therapist had 407 visits in 2000, the physiotherapist had 296 visits and the doctor had 424 visits. Massage therapy visits are said to have increased dramatically in recent months.
- The CPR clinics, the blood pressure clinics, the Food and Fitness Fair, the Health Expo, and the Amex Extreme Games are all well attended health and fitness events.
- During the third quarter of 2001, almost 20 percent of the employees at Amex's Markham facility participated in one or more fitness centre activities or programs.
- Employee Assistance Program counsellors had 221 cases in 1998-99 (August to July), 315 in 1999-00 and 397 in 2000-01. **Table 2** below shows the reasons for the visits.

Table 2
Employee Assistance Program
Percentage Breakdown of Reasons for Visits

Reason	1998-1999	1999-2000	2000-2001
Work-related	5.0%	5.8%	5.8%
Addiction	.9	1.9	2.3
Relationship/Family	37.6	31.1	N/A
Personal/Emotional	24.0	20.2	17.9
Stress	10.9	10.3	N/A
Medical	2.3	4.8	3.8
Legal	16.3	22.1	24.7
Financial	3.2	3.9	4.0

VI. Impacts

Amex Canada managers do not expend a lot of effort determining and measuring the impacts of their wellness program. As already explained, they accept that healthier employees make for increased customer satisfaction which, in turn, means increased profitability and growth. They also point out that it is exceedingly difficult to prove that a given outcome, say reduced absenteeism, was due to their wellness initiatives. It is particularly difficult to determine the extent to which a given business performance outcome, e.g., increased productivity, is attributable to the wellness program. In addition, senior Amex managers are personally committed to healthy lifestyles. Thus, they do not need hard data to convince them of the worth of a fitness program.

The numbers that the managers do look at carefully are the employee survey results. From these data, they determine whether or not the company's policies, including the human resource policies, are being well received by the work force. As noted earlier, employee satisfaction is linked, in management's view, to profits and growth.

Because of this employee satisfaction/profitability link, the firm monitors various aspects of employee satisfaction over time. The firm also benchmarks other measures to industry averages and averages in the subsidiaries around the world.

The statements in **Table 3** below, which appear on the annual employee survey, are related to employee well being and measure satisfaction levels among Amex employees at the Markham facility and at other Amex facilities in Canada. It is significant that, for the most part, positive results are increasing over time.

Table 3
Employee Survey Selected Results

Employee Survey Statement/Question	1998*	1999*	2000*
My leader supports my efforts to maintain a work-life balance.	N/A	71	75
I am able to maintain a work-life balance.	N/A	73	75
Amex offers a quality benefits program.	N/A	N/A	80
How do you rate your total benefits program?	39	48	67
Overall, American Express does a good job of meeting my needs.	75	72	73
My leader lives the Blue Box Values.	76	70	75
American Express has a sincere interest in its employees.	67	64	72
How satisfied are you with your physical working conditions?	66	65	67
Considering everything, I am satisfied with American Express as a place to work.	83	80	84
Compared to other companies, I am satisfied with American Express as a place to work.	79	78	82

*Scores are percent favourable. Rated as strongly agree or agree.

An interesting finding from the survey, as indicated in **Table 3**, is that 75 percent of employee respondents believe that they are able to maintain a work-life balance. The difficulty that employees have in meeting their work and family obligations is frequently cited as a source of worker stress in the literature. However, it does not appear to be a serious problem among Amex employees.

Another employee survey question asks employees how long they intend to stay with American Express.

Table 4
How Long Employees Say They Intend to Stay with Amex

Time Frames	%
0 to 1 year	4
1 year from now	10
3 to 5 years	18
5 to 10 years	21
10 + years	43

The fact that over two-fifths of respondents would like to stay with Amex for ten or more years provides further evidence of a high level of satisfaction among employees. It also suggests relatively low turnover rates in the future and, thus, lower recruitment costs.

The employee satisfaction levels at Amex Canada compare very favourably with those at other firms. As a subsidiary of American Express Company, Amex Canada is a member of a worldwide group of fifty Fortune 500 global companies which study and compare employee satisfaction levels. **Table 5** below compares employee satisfaction scores at Amex Canada with employee satisfaction scores at the Canadian operations of the fifty Fortune 500 firms.

Table 5
Employee Satisfaction at Amex Canada:
Comparison with the Canadian Industry Average

Employee Satisfaction Item	Amex Canada Inc.	Canadian Industry Average
I feel valued as an employee of American Express.	69% favourable	56% favourable
How do you rate your total benefits program?	67% favourable	44% favourable
My leader gives me regular feedback on improving job performance.	75% favourable	62% favourable
Overall, how good a job is being done by your leader?	73% favourable	63% favourable
When I do an excellent job, my accomplishments are recognized.	70% favourable	60% favourable

Another indicator that Amex managers track is the attrition rate. It has declined considerably since 1998, when the wellness initiatives began in earnest. In 1998, the attrition rate was 40.31 percent, in 1999, it was 29.84 percent, and in 2000, it stood at 22.99 percent. These numbers are for the Markham facility only where, as pointed out

earlier, about 80 percent of employees are call centre operators. It is generally thought within the call centre industry that the attrition rate in the industry is in the 40 percent range.

One could not say with certainty that the attrition rate decline was due to the wellness program. It could have been due to other factors. However, it seems reasonable to suggest that it had some influence.

The importance of the healthy workplace program to recruitment and retention was noted by the Vice President of Human Resources. He found from his experience that job seekers being interviewed by Amex are excited by the prospect of working at a company that has a fitness centre. It is one benefit that Amex has established to partly make up for the fact that its compensation is only at the industry average.

The number and types of medical and short-term disability claims being filed by employees are other statistics that the company pays attention to. By tracking trends over time, it can make appropriate changes to its benefit plan and its healthy workplace program.

When assessing a wellness initiative, one would want to know, at the very least, whether or not the users, in this case employees, feel good about the program, perceive that they are deriving some benefit from participating in the activity. At Amex, the Health Services Department, which has responsibility for the fitness centre, regularly surveys users of the centre and the Department's services to determine satisfaction levels, as well as user interests.

In 2001, Amex employees reported exceptionally high levels of satisfaction with the fitness centre. For instance, 100 percent of respondents say they are either very satisfied or satisfied with the class instructors and with the variety of services and activities offered. To the question, "Are you achieving results with your program?", 82 percent said yes.

Respondents also indicated very high satisfaction levels with the services provided by the nurse, doctor, massage therapist, and physiotherapist. In addition, 95 percent were either very satisfied or satisfied with the health education provided, and 91 percent said they were very satisfied or satisfied with the ergonomic assessments.

Clearly, Amex employees perceive that they are getting value from their involvement in the wellness activities.

VII. Conclusion

The preceding has described the healthy workplace program at a Canadian subsidiary of a U.S.-based company. It has shown the broad range of wellness activities and programs offered at Amex, attempted to explain the link between the company's business strategy and the wellness program, shown how senior management demonstrates its commitment

to the health of employees, and outlined the extent of employee involvement in the health and wellness activities. The discussion of impacts pointed out that Amex managers do not feel a need to measure, in a precise and thorough-going way, the impacts of the wellness program on individuals or the organization. They simply accept that healthier employees will mean more effective, creative and committed employees which, in turn, will mean better organizational performance. They also believe that it is not possible to show a cause-and-effect relationship between the wellness program and a given business performance outcome. Still, there are indicators that the company pays close attention to; they include employee satisfaction levels, (satisfaction with the company and with the wellness programs); attrition and absenteeism rates; and medical and short-term disability claims. Data provided by the company show high levels of satisfaction with the company and with the health and wellness program.

Appendix 1

Categories of Workplace Health Initiatives

Category	Specific Initiatives	Present ('X')
Physical Work Environment (factors that affect the safety of the work environment and the physical health of an employee)	Identification, evaluation and control of hazards (chemical, biological/infectious, physical)	X
	Ergonomics	X
	Injury prevention	X
	Emergency response programs	X
	Air quality	X
	Smoke-free workplace policy	X
	Other (specify)	
Safety Management Practices and Resources	Formal written health/safety policy	X
	Qualified health and safety technical knowledge present in the workplace	X
	Written safety rules and operating procedures, understood by employees	X
	Joint health and safety committee	X
Health Services (initiatives which have a direct impact on health)	Regular safety audit	X
	Employee/family assistance program	X
	Medical services (physicians, nurses, nurse practitioners)	X
	Workplace medical examinations; health risk screening	X
	Medical surveillance programs	X
	Immunization	X
	Disability case management; claims administration	X
Active rehabilitation	X	
Return to work initiatives	X	

	Self care education	X
	Disease management	X
	Occupational health and safety information systems	X
	Ergonomic assessments	X
	Other professional services (fitness professionals, etc.)	X (personal trainers, fitness appraisals, post-rehab with physiotherapy)
	Other (specify)	X (physiotherapy, massage)
Work-Family Life (workplace initiatives to help employees balance work and personal life)	Child care	X (referral only)
	Elder care	X (referral only)
	Personal responsibility leave	X (sabbaticals)
	Alternative work arrangements	X
	Work-family life transition support	X
	Other (specify)	X (EAP and others)
General Working Environment (general workplace practices which could affect personal health and safety, socio-economic or career opportunities, and employees' sense of well-being)	Violence in the workplace	X
	Equity in the workplace	X
	Harassment policy	X
	Literacy/numeracy	X (educational assistance)
	Other work-related skills development (e.g., professional development, skill-enhancement training)	X
	Other (specify)	
Workplace Culture (psycho-social aspects of the workplace that affect mental, physical and social health)	Employee empowerment	X
	Participation in decision-making about workplace changes	X

	Pace of work	X
	Two-way communication	X
	Incentive/recognition programs	X
	Other (specify)	
Healthy Living (individual lifestyle factors, promotion of healthy living, prevention of illness)	Substance abuse	X (EAP)
	Smoking cessation/control	X (EAP)
	Nutrition/weight control	X
	Disease prevention (chronic/infectious)	X
	Stress management and mental health	X
	Active living and fitness	X
	Other (specify)	X (fairs, education sessions)
Supplemental Health and Dental Benefits	General health benefits (e.g., home care, out-of-country coverage, vision care)	X
	Dental benefits	X
	Other (specify)	X
Other (specify)	Diversity	X

Appendix 2

The following are some of what the company considers to be "notable initiatives" in health and wellness undertaken over the last few years:

a) *Nutrition*

- nutrition and lifestyle education (1998, 1999)
- calorie stampede (1998, 1999)
- nutrition trivia (1999, 2000)
- food and fitness fair (annual)
- cafeteria tour (1999)
- recipe of the month (1999)
- great food fast seminar (2000)
- trip to the grocery store (2000)

b) *Physical Activity*

- 5 km rat race (1999)
- big bike (annual)
- rollerblade day (1998)
- volleyball tournament (annual)
- midsummer night 5 km run/walk (1998)
- indoor soccer tournaments (annual)
- pilates class (1998, 1999)
- bike care seminar (1999)
- Baycrest running challenge (2000)
- adopt-a-couch (2000)
- resist-a-ball class (ongoing)
- salsa and meringue lesson (1998)
- track your progress (1998)
- ride for diabetes (1998)
- Scotia Bank 5 km run (breast cancer centre, 1998, 1999)
- golf day (annual)
- summer end extreme games (annual)
- 'do more' Amex running clinic (on-going)
- 'do more' walking club (on-going)
- Canadian international marathon (team relay, 1999, 2000)
- don't be a plumpkin class (annual)
- mini-triathlon (annual)
- thriving not surviving (1999)
- self-defense/karate (1999, 2000, 2001)
- President's Choice duathlon series (2000)

- introduction to judo (2000)
- Amex ski trip (2000, 2001)
- ballet basics class (1999)
- line dancing (1999, 2000)
- weight training series (1998, 1999)
- rock climbing (2000)
- tai chi (2000)
- Avon 10 km race (1998, 1999)
- CN Tower climb (2000)

c) *Health and Wellness Education*

- planning for pregnancy seminars (four-part series, 2000)
- naturopathy information sessions (2000)
- breast exam awareness (1998)
- back care seminar (1998, 1999)
- stress management seminar (1999, 2000, 2001)
- osteoporosis seminar (1998, 1999)
- six-week lifestyle/weight management program (1998)
- breast cancer information (1999)
- clinique skin care seminar (1999)
- aromatherapy (1999, 2000)
- pregnancy and exercise (2000)
- health/self-care education (1999)

d) *Other*

- flu shot clinics (annual)
- blood pressure clinics (1999, 2000)
- massage therapy (1999, 2000)
- physiotherapy (2000, 2001)
- smoking cessation (1999)