

PADUCAH

BLUE ZONES PROJECT PROPOSAL



BLUE ZONES PROJECT®
by HEALTHWAYS

May 2017

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Executive Summary

In 2009, research in the Journal of American Medicine indicated that less than 8% of the U.S. population adhere to five core healthy habits – not smoking, eating healthy, maintaining regular physical activity, avoiding increased use of alcohol, and maintaining a healthy weight – down from 15% only twenty years previous. Today, indicators point to that number as being halved again – meaning, less than 4% of the U.S. population today achieves consistency in adhering to healthy habits. The combined effect and trends of lifestyle risks and burden of chronic disease continue to increase dramatically, causing unsustainable growth in medical costs, lost productivity and even regional economic decline.

The Greater Paducah region - defined as the five counties of McCracken, Ballard, Graves, Livingston, and Massac Counties - has experienced similar trends and faces impending decline in the future health of its population. ***The compounding effect of the current state of lifestyle risks and chronic disease burden will drive future medical costs and lost productivity costs in the Greater Paducah area to increase by \$433 million annually in the next ten years.***

It is well established that the underlying causes of these trends are our environments – the people, places and policies we are exposed to every day and over time. Each of these factors influences how we make thousands of decisions every day – many unconsciously – that form our habits. Therein lies the unique opportunity to do something very different to impact the entire community by changing the environments where people spend time.

Blue Zones Project is a proven approach based on that premise. Nearly fifteen years of research by Blue Zones and its partners has shown that by applying the cultural and environmental practices of the world's longest-lived people, we can quickly and dramatically change a community's future course to one of improved health and economic vitality. By adopting certain systemic changes, whole communities have been able to re-engineer environments and culture to make the healthy choice the easy choice.

For the Greater Paducah area, implementing Blue Zones Project across the region would create a modeled impact of \$202 million in combined medical cost savings, improved productivity, and regional economic impact over the next 10 years. The Greater Paducah Value Brief detailing total projected savings across the five county region is included in Appendix B. Of note, the Greater Paducah region used to project this value is larger than the proposed scope of work in this proposal which focuses on the City of Paducah proper. Consequently, the medical and productivity savings and regional economic impact for the City of Paducah will be lower than the total savings presented for the Greater Paducah region.

Vision & Model

Blue Zones Project® and the leadership of Paducah share a commitment to improving the well-being of all residents, thereby lowering healthcare costs, increasing productivity, and improving quality of life. The cost of doing nothing in the Greater Paducah region is astounding. To begin to improve well-being across the region, we recommend using the City of Paducah to demonstrate community well-being transformation for the broader region. With Paducah as an example, other communities in the region may be inspired to join. Bringing Blue Zones Project to additional communities in the Greater Paducah region over time could eventually create a region that stands out in Kentucky as a place with higher well-being and quality of life.

Blue Zones Project® leverages best practices and tenets from the original Blue Zones®- places where people live the longest- coupled with other research-supported interventions. The Project takes a unique, systematic approach to improving well-being by focusing on the people, places, and policies within our “life radius.” By making permanent and semi-permanent changes in the environments where we routinely spend our time, we make healthy choices easier and people naturally adopt healthier behaviors together as a community.

People: Tools and Resources for Individuals

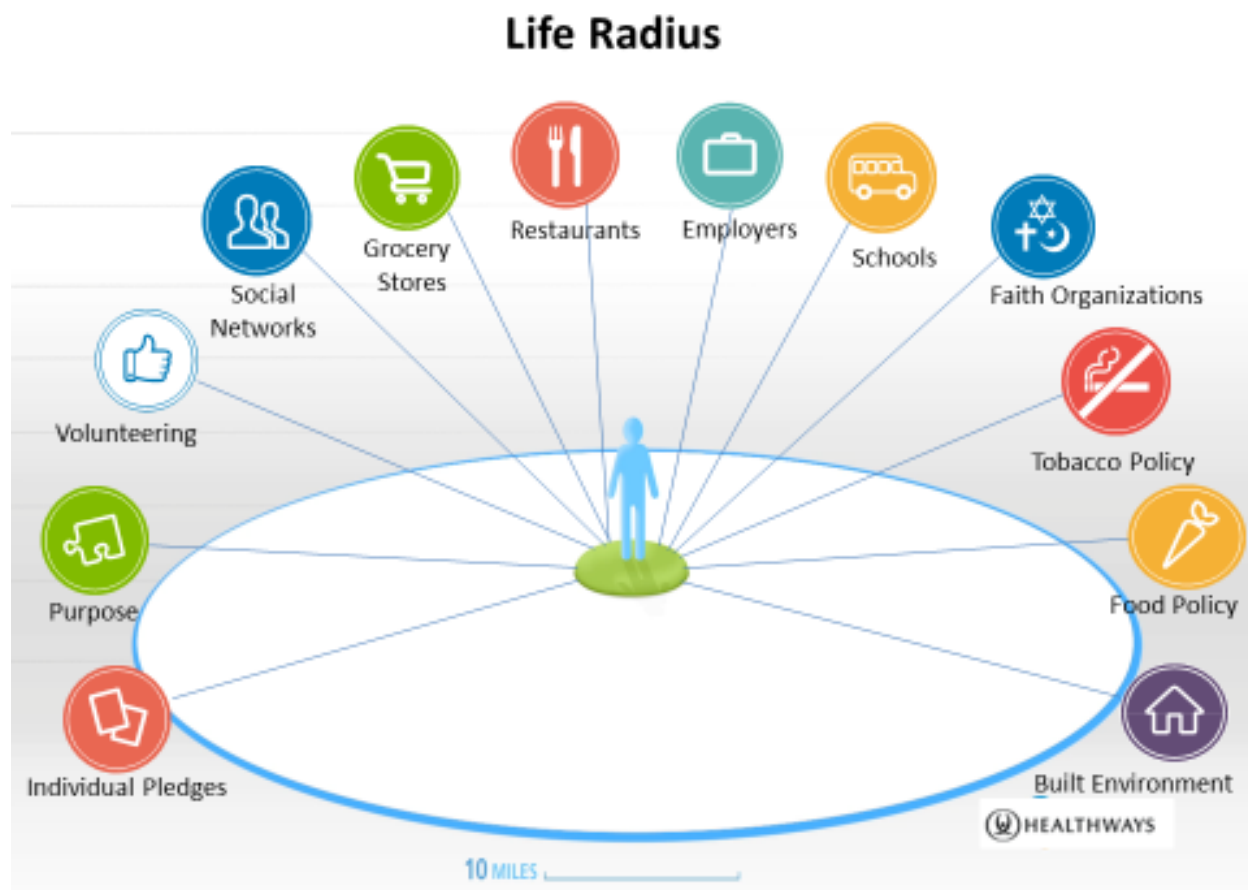
We engage people to optimize their homes and social environments with the Personal Pledge; provide opportunities to discover their purpose; facilitate volunteer experiences to connect with the community; and bring people together to create healthy social networks.

Places: Tools and Resources for Organizations

We orchestrate a critical mass of worksites, schools, restaurants, grocery stores, and faith-based organizations across the community to optimize environments toward healthy living. Each organization is provided a pledge listing best practices they can implement to improve their environment and make the healthy choice easier. Trained local staff members support these organizations as they implement best practices to become Blue Zones Project Approved.

Policy: Sustainable Policy Transformation

Our national experts work with city leaders to offer national best practices in food policy, tobacco policy, and the built environment. Through policy summits that bring together key stakeholders in each policy area, community leaders select the policies they would like to adopt in their community. By improving community infrastructure and public policies, we maximize residents’ abilities to move naturally, connect socially, access healthy food, and improve their quality of life.



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PEOPLE: TOOLS AND RESOURCES FOR INDIVIDUALS

In the Blue Zones Project® community model, we deploy a set of scalable tools for individuals to help guide them on a path to a healthier and happier life. These tools include:

- **Blue Zones® Personal Pledge:** Individuals commit to improving their personal well-being by adopting a number of best practices related to the Blue Zones® Power 9® principles.
- **Blue Zones Engagement Speeches:** Trained Blue Zones Project staff deliver engagement speeches explaining the Blue Zones Project® and how an individual can become involved.
- **Purpose Workshops:** Trained facilitators lead purpose workshops that help individuals gain a new understanding of why purpose matters, identify their gifts, draft a purpose statement, and commit to pursuing a life-long purpose journey.
- **Moais:** A Moai (pronounced “Mo Eye”) is a group of people who meet for a common purpose. We help individuals form new social networks that support healthy behaviors through the creation of walking, potluck, and purpose moais.
- **Blue Zones Project Ambassador and Volunteer Opportunities:** Community members who want to champion Blue Zones Project at their organization or other organizations are trained to become Blue Zones Project Ambassadors. Individuals also have many opportunities to volunteer on Blue Zones Project committees or at Blue Zones Project events. We also help individuals find other community volunteer opportunities that align with their purpose through volunteer fairs held in conjunction with purpose workshops.
- **Blue Zones® Checklists:** Home, kitchen, bedroom, family, and tribe (social network) checklists help individuals improve their well-being by providing best practice ideas inspired by Blue Zones® Power 9® principles.
- **Blue Zones® Project Recipes and Newsletters:** Individuals get access to a database of recipes for preparing foods the Blue Zones® way and newsletters with information on upcoming events, activities, and recent successes.
- **True Vitality Test:** Individuals get access to the Blue Zones® longevity calculator and web-based tailored coaching program designed to drive individuals to adopt Power 9 Principles.

- **QuitNet:** Individuals get access to a free online tobacco cessation social community with over 1 million members.

PLACES: DESIGNING ORGANIZATIONS FOR GREATER WELL-BEING

Worksites, schools, restaurants, grocery stores, and faith based organizations are places in which people spend time daily. Our Blue Zones Project teams are experts at optimizing design and policy so that people are subtly nudged into eating better, eating less, moving more, and engaging in healthy social networks all day long.

We engage organizations in this solution by visiting a critical mass of all places, offering them expertise and a program to help them implement best practices in optimizing their environments. The local Blue Zones Project team drives engagement, facilitates the use of evidence-based tools and services, and supports organizations implementing the pledges and activities. “Blue Zones Approved” is often thought of as the LEED Certification of Health and Well-Being.

Sector Pledges: Our teams use pledges, or menus of best practices, that organizations can implement to optimize their environment for better health and well-being. Organizations that meet certain thresholds qualify to become Blue Zones Project® Approved.

- **Blue Zones® Worksite Pledge**
- **Blue Zones® Schools Pledge**
- **Blue Zones® Grocery Store Pledge**
- **Blue Zones® Faith Based Pledge**
- **Blue Zones® Restaurant Pledge**
- **Blue Zones® Community Policy Pledge**
- **Blue Zones® Organization Checklist**

- **Communications and Marketing Library:** Provides printable marketing communications that promote positive lifestyle changes and build excitement and awareness for Blue Zones Project®. Library includes monthly newsletters, posters and email templates.
- **Individual Well-Being Report For Worksite Employees:** Provides employees with personalized guidance on their well-being improvement, based on responses to the Gallup-Sharecare Well-Being 5 Survey and health risks
- **Organizational Well-Being 5 Report for Worksites:** Provides a comprehensive view of workforce's well-being, including the factors that most frequently drive employee engagement, productivity, and company performance
- **Employee Toolkit:** Access to all of the tools and resources noted in the section titled "Scalable Tools and Resources for Individuals"
- **Sector Specialists and Account Management:** Blue Zones Project® will staff experts in market who will serve as consultants to organizations in the planning and deployment of tools and resources to implement benchmarks to becoming a Blue Zones® organization.

POLICY: SUSTAINABLE POLICY TRANSFORMATION

We engage communities in local and regional policy transformation in order to ensure that efforts have a sustained and lasting impact. Blue Zones Project® focuses on the three policy areas of built environment, food policy, and tobacco policy. Our policy work happens in four stages: discover, develop, design, and deploy.

During the discovery stage, we leverage national experts in each policy area to interview key stakeholders and review existing policy documents to assess the strengths, opportunities, and challenges in the current built environment, food environment, or tobacco environment. In the development stage, we work with local partners and government staff to provide technical assistance and training around proven best practices in each policy area. During the design phase, national experts facilitate policy summits to present best-practices that have worked in other communities and help stakeholders prioritize which ones to pursue over the life of the project. The Blue Zones Project experts, in collaboration with the local team and community

leaders, will develop a detailed plan for implementation and transformation, complete with key milestones.

We only move forward on policies and projects that have community support, are affordable given current budgets and are achievable within the scope of the Project. During the deploy stage, Blue Zones Project provides technical assistance and capacity-building to support implementation of the policy priorities identified during the policy summits.

See Appendix E for a full description of the 4D Approach to Built Environment & Food Policy.

Community Certification

A community has the opportunity to become a certified Blue Zones Community® after meeting criteria that substantiates that a significant and measurable improvement in the overall health and well-being of the community has been realized along with evidence of environmental change. The certification criteria are reflective of the level of momentum required to create a critical mass of sustainable change within a community and are based on 13 areas of focus within the life radius including:

PEOPLE	POLICY	PLACES
• Engagement Speech	• Built Environment	• Schools
• Moai Participation	• Food Policy	• Restaurants
• Purpose	• Tobacco Policy	• Grocery Stores
• Volunteering		• Worksites
• Public Awareness/Media		• Faith Based Organizations

See Appendix G for a full description of the Community Certification Criteria.

Paducah Proposal

The recommended approach to implementing Blue Zones Project® in Paducah is to conduct a focused, three and a half-year, community transformation project in the City of Paducah proper, impacting approximately 25,000 people. The first six months will be spent doing a deep readiness assessment of the community and creating a customized Blueprint for implementation. The next three years will be spent executing on the Blueprint for community transformation and planning for sustainability.

Discovery & Planning Phase in Paducah: 6 months

The Blue Zones Project team will begin with a Discovery and Planning Phase in Paducah to determine the readiness and opportunities for success in undertaking a Blue Zones Project transformation initiative. Building upon the two day site-visit findings, the Blue Zones Project team will conduct many more stakeholder meetings and focus groups to build engagement and excitement around the project and provide critical information to the Blue Zones Project team about how best to roll out the project in Paducah.

During the Discovery and Planning Phase, Blue Zones Project policy experts will also assess the current state of the built environment, food environment, and tobacco environment. Following a discovery process, these experts will facilitate a policy summit for each policy area to bring together all stakeholders to identify policy priorities for the City of Paducah.

Also during the Discovery and Planning phase, a Steering Committee and Leadership Team will be formed comprised of community leaders across Paducah. This group will provide strategic input and guide implementation throughout the life of the project. A local staff team hired from the community and the national Blue Zones Project team will work with these leadership committees to create a Blueprint for Paducah. The Blueprint is a detailed work plan that provides structural discipline to guide a City toward becoming a Blue Zones Certified Community. The Blueprint is updated annually based upon the previous year's progress and emerging priorities. *For more information about the Discovery and Planning Phase, see Appendix C.*

Implementation Phase in Paducah: 3 Years

When the Blueprint is complete, the local Blue Zones Project team will hold a community kick-off event to launch Blue Zones Project implementation in Paducah. Staff will engage schools, worksites, restaurants, grocery stores, faith-based organizations, and civic and non-profit organizations across Paducah, and launch a community-wide marketing campaign to drive engagement. Staff will begin individual engagement activities including engagement speeches, purpose workshops, and moai launches. The local staff team will also work alongside policy committees comprised of community leaders, government staff, and elected officials to begin pursuing adoption and implementation of the City policy and project priorities identified during the policy summits. *For more information about the full Community Model, see Appendix D.*





Phase II Planning: 6 Months

During the last six months of the operating period, the Blue Zones Project national team and local staff team will work with community leaders to create a plan to sustain Phase I value and identify opportunities and requisite resources for value expansion through Phase II. The plan will identify recommended resources needed to expand upon the progress made to date in Paducah and assist the community in conversations to support the roles and resources. Also during this time, Blue Zones Project staff will work with community leaders to discuss interest in expanding the Project to additional communities within the region.

Certified Blue Zones Worksite Model for Lead Sponsor: 3-3.5 Years

The Blue Zones Project team will guide the lead sponsor of Blue Zones Project Paducah through the Certified Blue Zones Worksite Model. The Certified Blue Zones Worksite Model advances the core components of the Blue Zones Project Community Model and creates a customized plan that aligns with the unique needs of the employer. It focuses on deploying resources and tools that are essential in transforming the workplace through a multi-year effort. Through its strategically phased approach, the Certified Blue Zones Worksite Model optimizes well-being opportunities across the work community, employee social network, and physical environment, while connecting employees to their own purpose within the context of their work. We measure the impact of the employer's efforts through the Gallup-Sharecare Well-Being 5 Survey and award Certification when criteria are met. *For more information about the Certified Blue Zones Worksite Model, see Appendix H.*

Timeline

	2017	2018	2019	2020
Paducah Discovery & Planning				
Paducah Implementation				
Phase II Planning				
Certified Blue Zones Worksite Model for Lead Sponsor				

Value Delivered & Measurement

The quantifiable value of Blue Zones Project® within a given community is determined based on three levels of measurement tied to implementation of Blue Zones Project®.

- Reduction in lifestyle risks as measured by the Gallup-Sharecare Well-Being Index and specific survey elements most closely tied to overall well-being improvement and the Blue Zones Project interventions.
- Movement in community based metrics that are reflective of the priorities of the community and in alignment with the Blue Zones Project® model. These community based metrics will vary by community based on the data readily available and provide additional plausibility to the results noted in well-being improvement data.
- Value associated with the media interest generated by Blue Zones Project® and grant funding secured with support from the Project.

The Gallup-Sharecare Well-Being Index® (WBI) is the primary measurement tool for Blue Zones Project® with a special focus on 20 elements of the survey most closely aligned with the Blue Zones Project® model. Utilizing the Well-Being Index allows for unprecedented measurement of the specific challenges communities are facing and improvements over the course of the Blue Zones Project transformation initiative. A baseline WBI survey of Paducah will be conducted during the Discovery and Planning Phase. After this, the WBI survey will be conducted on a bi-annual basis to track change over time in the 20 Blue Zones Project specific measures and the overall WBI score. Additionally, community specific metrics will be selected to track over the course of the project to provide additional insight into the impact of the project.

An additional benefit realized by communities implementing Blue Zones Project® is attachment to a national brand which has generated significant media interest over time as the impressive progress of Blue Zones® Communities across the U.S. has been reported. The number of media impressions and the value derived by them is tracked over the life of the project. We also track grant funding secured with support from the Blue Zones Project initiative.

Staffing Model

The Discovery and Planning Phase will be conducted by the Blue Zones Project national team of experts and community staff members from Blue Zones Communities across the Country. During the Discovery and Planning Phase, a local team of 5 full time staff will be hired from the region to assist with the formation of the leadership and sector committees and Blueprint creation. Once the Blueprint is complete, the local staff team will take primary ownership of the Project, leading Blueprint implementation in Paducah. All staff will be trained by national Blue Zones Project staff and be required to meet Blue Zones Project training standards before beginning work in the community. The local team will be supported by the Blue Zones Project® national team on an ongoing basis. Additionally, national experts in food policy, tobacco policy, and built environment policy will be leveraged to conduct an analysis of the current state of policy in each of the three policy areas, lead policy summits to prioritize policies and projects for the Blue Zones Project implementation phase, and provide ongoing technical assistance with policy implementation.

See Appendix F for a detailed description of the Blue Zones Project® governance structure, volunteer roles, and job descriptions

Deliverables & Fees

Deliverables

Discovery & Planning Phase in Paducah

- Completion of the Discovery and Planning Phase in Paducah including stakeholder meetings, focus groups, and opportunity analyses.
- Gallup-Sharecare Well-Being Index data oversample for the City of Paducah proper.
- Built environment, tobacco policy, and food policy environmental review and policy summits led by national experts.
- Hiring and training a local staff team of 5 staff members.
- Creation of Steering Committee and Leadership Team to guide Blue Zones Project strategy.
- Facilitated training for Steering Committee, Leadership Team, and Sector Committees.
- Completion of community-specific Blueprint informed by the Discovery phase findings.
- Customized website to support the deployment of the Blue Zones Project tools and assist in community engagement in Paducah.
- Inclusion on media opportunities focused on national Blue Zones Project initiatives.

Implementation Phase in Paducah

- Community kick-off event for all residents of Paducah.
- Blueprint implementation of People, Places and Policy strategies in Paducah.
- Launch of marketing campaign to drive engagement across the community.
- Bi-annual Gallup-Sharecare Well-Being Index data oversample for the City of Paducah proper.
- Continued support from national experts for implementation of priorities in the built environment, food policy, and tobacco policy areas.
- Continued support from Blue Zones Project national team for community implementation across Paducah.

- Inclusion on media opportunities focused on national Blue Zones Project initiatives.
- Blue Zones Project certification audit if Paducah has met all of the certification requirements by the end of the contract period.

Phase II Planning Phase

- Creation of a sustainability plan to ensure gains are maintained.
- Development and presentation of a proposal for expansion beyond the three and a half-year operating period.

Certified Blue Zones Worksite Model for Lead Sponsor

- Completion of a discovery process that includes an analysis of worksite documents and onsite focus groups and meetings led by a Blue Zones Project Consultant and team.
- Creation of a Certified Blue Zones Worksite Assessment Report and Certified Blue Zones Customized Pledge tailored to the company's unique environment.
- Deployment of the Gallup-Sharecare Well-Being 5 Survey and True Vitality Test to track changes in employee well-being over time.
- Ongoing support from a Blue Zones Project consultant throughout the discovery and implementation phases.
- Certified Worksite Kick-Off Event to introduce the project to employees.
- Onsite ambassador training for volunteers to encourage colleague participation and lead efforts to implement pledge recommendations.
- Leading Well-Being Workshops for select leaders at the worksite.
- Purpose Workshops and Moai launches to engage employees.
- Access to a communications library with printable marketing communications that promote positive lifestyle changes and build excitement and awareness for the Blue Zones Project. The library includes Blue Zones checklists and the Personal Pledge.
- Creation of a Certification Report after completion of the customized pledge actions and a second round of Well-Being 5 Survey measurement. The report summarizes the organization's certification journey and outcomes and provide a plan for sustainability.
- Completion of a Certified Blue Zones Worksite Celebration Event.

Proposed Fees

The table below presents a summary of pricing for the solutions proposed.

	Discovery	Year 1	Year 2	Year 3	Total
Fees					
Fixed Fees (80% of Total)	\$500,000	\$1,600,000	\$1,600,000	\$1,680,000	\$5,380,000
Performance Based Fees (20% of Total)		\$400,000	\$400,000	\$420,000	\$1,220,000
Transition Assessment				\$150,000	\$150,000
Fees Total	\$500,000	\$2,000,000	\$2,000,000	\$2,250,000	\$6,750,000

*Performance based fees represent 20% of overall fees for the implementation period.

Resource Allocation

Below are approximate ranges of allocations. These allocations may shift categorically when the project Blueprint is approved and as the project progresses overtime.

Resource Category	Allocation (% of total Blue Zones Project Fees)
Staffing/Travel/Training	30% – 35%
Marketing and Engagement Activities & Events	10% – 14%
National Experts/Consultants Professional Fees	10% – 15%
Infrastructure and Technology	5% - 7%
Account Management/Corporate Support	5% – 10%
Licensure and Intellectual Property Fees	20% - 25%
Performance Guarantee/Value Share Fees	10-25%

Staffing/Travel/Training Resources

The local team is responsible for coordinating hundreds of volunteers, orchestrating numerous events; garnering public support and active engagement for policy changes in the city and school districts; and managing the public participation process. The local team is supported by a staff of national experts who have successfully implemented the Blue Zones Project in other communities along with a team of experts in the marketing engagement aspects of the Blue Zones Project. Resources include any travel and training needs associated with these teams in support of the community.

Marketing and Engagement Activities & Events Resources

Marketing and engagement of the community is key to the success of a Blue Zones Project. This category includes marketing materials, website and social media development and maintenance, collateral materials, video, event invitations and materials and media relations; the kick-off event and other community events and associated activities; access to nationally developed core materials and online resource center; national PR campaign participation.

National Experts/Consultants Professional Fees

National experts and consultant professional fees include the annual Well-Being Index oversample implemented by Gallup and the associated analytics along with national experts in the areas of built environment, tobacco and food policy.

Infrastructure and Technology

Infrastructure includes Class B office rental, furniture and equipment, hardware/software, office supplies, fulfillment and all other typical business expenses related to supporting staff and volunteers. Technology expenses include customization, branding, implementation, and maintenance of all community specific web and mobile e-tools. Additional resources include all tracking, storage and analytics of pertinent data throughout the project.

Licensure & Intellectual Property

Licensing and partnership fees include the exclusive rights to use the Blue Zones trademark and brand and principle intellectual property owned and developed by Blue Zones, LLC. The intellectual property was created as a result of an eight-year international study supplemented with continuous innovation to update best practices in all aspects of the Blue Zones Project model. It also includes the personal participation of members of Blue Zones LLC's expert team.

Account Management/Corporate Support

Account Management support includes a designated business leader and multi-disciplinary team to fulfill contract service and project governance responsibilities on behalf of the Blue Zones Project. Corporate support includes access to enterprise functions such as human resources, accounting, finance, legal, science, etc.

Performance Guarantee/Value Share Fees

A portion of total fees are subject to performance and value creation. The proposal includes the assumption that the Blue Zones Project will achieve or exceed targets for mutually agreed upon success and value metrics.

Appendices

- A. Paducah Site Visit Report**
- B. Greater Paducah Value Brief**
- C. Discovery and Planning Phase Scope and Deliverables**
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- E. 4D Approach to Built Environment & Food Policy**
- F. Blue Zones Project Governance, Volunteer Roles, and Job Descriptions**
- G. Blue Zones Project Certification Process, Criteria and Pillars**
- H. Certified Blue Zones Worksite Model**

Appendix A: Paducah Site Visit Summary Report

PADUCAH SITE VISIT

May 1-2, 2017

SITE VISIT OVERVIEW

A Blue Zones Project Site Visit allows communities to demonstrate their leadership commitment, motivation, and readiness to become the next Blue Zones Project Community. On May 1-2, the Blue Zones Project team visited Paducah to meet with community leaders across all of the sectors Blue Zones Project engages – policy, worksites, schools, faith-based organizations, civic/non-profit groups, media, restaurants, and grocery stores. Through a community-led presentation, focus groups, and one-on-one meetings, the team learned about Paducah's unique community assets and challenges and current and past efforts to improve community well-being. Community leaders and citizens shared their ideas for how Blue Zones Project could improve well-being in Paducah by aligning with current initiatives and bringing evidence-based best practices, tools, and expertise to the community.

After two full days of meeting with the community, the Blue Zones Project team was impressed with the broad level of support across sectors and the desire of community leaders to bring Blue Zones Project to Paducah. Below, we summarize what we learned about Paducah, key opportunity areas where we believe Blue Zones Project would add great value, and individuals and organizations missing from the site visit that we would want to meet with early on if Blue Zones Project comes to Paducah. The site visit is the first step in building community engagement, buy-in, and support for Blue Zones Project. If Blue Zones Project comes to Paducah, we will start with a six month Discovery and Planning Phase to engage additional leaders, community members, and organizations to expand our understanding of the community and inform a customized Blueprint, or strategic plan, for implementing Blue Zones Project in Paducah.



COMMUNITY LEADERS ENGAGED

- Mayor Brandi Harless, City of Paducah
- Jeff Pederson, City of Paducah City Manager
- Sandra Wilson, Chamber President and Mayor Pro Tem
- Dr. Anton Reece, President of West Kentucky Community and Technical College
- Donald Shively, Superintendent of Paducah Independent Schools
- Cindy Dobrzynski, Senior Mission Executive, Lourdes Hospital
- Dona Rains, Director of Community Outreach at Baptist Health
- Emerson Goodwin, Corporate Regional Director at Kentucky Care
- Steve Powless, CEO of Computer Services Inc
- Justin Dickens, Risk and Administrative Manager, Crounse Corporation
- Nathan Joyce, Pastor of Heartland Worship Center
- Ray Henderson, Pastor of Washington Street Missionary Baptist Church
- Jaymie Broome, Senior Minister at Immanuel Baptist Church
- Andy Carloss, Owner of Midtown Market
- Ed Musselman, Owner of Coca Cola building and Mellow Mushroom
- Sarah Bradley, Owner and Chef of Freight House
- Steve Wilson, Executive Editor of the Paducah Sun
- Bill Evans, VP of News and Operations, WPSD, Local 6

ORGANIZATIONS ENGAGED

- City of Paducah
- Paducah Independent Schools
- West Kentucky Community and Technical College
- Baptist Health
- Lourdes Hospital
- Purchase District Health Department
- Computer Services Inc
- Crounse Corporation
- Heartland Worship Center
- Washington Street Missionary Baptist Church
- Immanuel Baptist Church
- Paducah Sun
- WPSD Local 6

INDIVIDUALS & ORGANIZATIONS BLUE ZONES PROJECT STILL NEEDS TO ENGAGE

- McCracken County elected officials and staff
- McCracken County School District Superintendent
- State of Kentucky
- Walmart
- United Way
- Leader of Paducah Cooperative Ministry
- Leader of Jewish faith-based community and First Baptist Church
- Leaders of the African American community

LEADERSHIP COMMITMENTS BLUE ZONES PROJECT REQUIRES OF COMMUNITIES DURING DISCOVERY & PLANNING (75% of following, including all asterisks leaders)

- Mayor*
- City Administrator/Manager*
- City Planning Director*
- City Public Works Director
- Superintendent of school district*
- At least half of elected city council members (City Council resolution of support will meet this requirement) *
- CEO's of largest employers*
- President/CEO of Chamber of Commerce*
- Head of Public Health Department
- Head of local university/community college
- Head of Restaurant Association (if applicable)
- Head of predominant grocery store chains*
- Station Manager of predominant local television station*
- Owner/Editor of predominant local newspaper*
- Owner of predominant local radio station



Dan Burden, Blue Zones Project Built Environment Expert, with Paducah city leaders and staff

COMMUNITY READINESS

CRITERIA	SCORE (1=Very Negative, 5=Very Positive)	SUMMARY
Leadership support across sectors	4	<ul style="list-style-type: none"> Met with over 20 leaders from the community representing government, healthcare, schools, employers, civic groups, media, and restaurant sectors. All leaders were supportive of bringing Blue Zones Project to Paducah. Met with several major employers including both hospital systems, the Paducah independent school district, the city, CSI, and Crounse Corporation; however, Blue Zones Project will need to secure support from other large employers in the community. The schools focus group was the smallest with representation from the Paducah Independent Schools only. We would have liked to meet with the Superintendent and staff of the McCracken County School District to gauge their support.
Governing body support and continuity	4	<ul style="list-style-type: none"> The Mayor and City Commissioners we met with were supportive of Blue Zones Project. They recognize that the project aligns with existing community initiatives and recognize that focusing on health and well-being could be a distinguishing factor for the city. Paducah would be the first city in Kentucky to partner with Blue Zones Project. Blue Zones Project did not spend enough time with County officials or staff to gauge their support. Depending on the scope of the project, we will need to meet with these individuals to ensure the success of the project.
Alignment of community's current initiatives and strategic plans with Blue Zones Project	4	<ul style="list-style-type: none"> Purchase Area Health Connections and Healthy Paducah are existing coalitions of diverse partners dedicated to improving health and well-being in the greater Paducah area and sharing assets and best practices. This evidence of collaboration is very promising for the success of Blue Zones Project. Through the Forward Paducah Vision & Strategic Plan, the City is prioritizing the expansion and improvement of trails, parks, bike infrastructure, and recreational facilities. Currently studying new bike connectors to the Greenway Trail. The Purchase District Health Department is actively working to enhance existing tobacco policies in place at the City. Their advocacy efforts are very aligned with Blue Zones Project work in tobacco policy. All community leaders we met with understood the need to address health and well-being in Paducah. Not only is there universal acknowledgement of the severity of the health problems but also a collective drive to do something about it rather than maintain the status quo. Community leaders and citizens shared a desire for the City of Paducah to distinguish itself in a new way that would unite all residents around a common vision, and there appeared to be a lot of interest for Paducah distinguishing itself as the healthiest city in Kentucky.

SECTOR & ATTENDANCE	STRENGTHS	CHALLENGES	OPPORTUNITIES
<p>Worksites</p> <p>15 Focus Group Participants</p> <p>7 Employer 1:1 Meetings</p>	<ul style="list-style-type: none"> • Good representation of smaller businesses in the focus groups and some larger employers in individual meetings. • With designation as a UNESCO Creative City and vibrant arts community, Paducah has a new group of young entrepreneurs invested in making the community better. • The Chamber is the fourth largest in Kentucky with a large membership that could participate in Blue Zones Project. It offers important services like career training and networking opportunities for young professionals. • Healthworks is a local source for corporate well-being programs. • Employers have a history of community giving and philanthropy. 	<ul style="list-style-type: none"> • Limited best practice sharing between worksites around employee well-being. • Changing norms within worksites to improve health could face pushback from employees. • Prevalence of small businesses where it can be more challenging to implement best practice around employee well-being given limited financial and staff resources. 	<ul style="list-style-type: none"> • Partner with Chamber of Commerce, Healthy Paducah, Young Professionals, and the Professional Business Association to engage employers and share best practices. • Encourage employers to point to Blue Zones Project for why they are making changes as this can help lessen employee push-back. • Health systems, school districts, and city as major employers can set the example by becoming first Blue Zones Approved Worksites. • Leverage learnings from the city's wellness program and the bank's work around purpose to improve Blue Zones Project worksite tools and engagement. • Work with employers to adopt tobacco-free campuses and other policies that encourage employees to quit tobacco use.
<p>Community Policy</p> <p>34 Focus Group Participants</p> <p>1 Government 1:1 Meeting</p>	<ul style="list-style-type: none"> • Paducah is a major transportation hub and a destination for surrounding communities, so what happens in Paducah would also benefit surrounding communities. • Mayor and City Commissioners are strong leaders committed to positive change in Paducah. • The greenway trail is a well-used community asset and the City has recently extended it and made improvements. • Downtown is a vibrant public space people enjoy spending time in. • There are many trees throughout the city, providing shade and a sense of enclosure—two elements that encourage people to walk. • There appears to be a shift in culture with more people walking and biking for recreation. • Climate supports a robust agricultural community, creating opportunities for farm-to-table or farm-to-school sourcing. • Restaurants are increasingly offering vegetarian or heart-healthy options, and some post calorie counts. • Midtown Market, the farmer's market downtown, and CSA's are sources of locally-grown produce. 	<ul style="list-style-type: none"> • Twenty-five percent of Paducah residents live in poverty and may not have access to healthy, affordable food or own a car. • Lack of connectivity between existing walking, biking facilities and residential areas. • Many streets lack sidewalks and shoulders. Bicyclists are frequently hit. • There is no walk/bike connection between public housing and the mall where jobs are. • Some residents do not understand the value of investing in the built environment and resist improvements in parts of the city they do not live in. • Paducah was recently deemed the fast food capital of the U.S. There are few local restaurants and there is a fried food culture. • The south part of town lacks easy grocery store access. Healthy markets and restaurants are clustered in midtown. • Drug addiction and mental illness are big issues in Paducah, so tobacco use may seem less important to some stakeholders. • There is no county-wide smoking policy and some restaurants in the county allow smoking inside. 	<ul style="list-style-type: none"> • Adopt a Complete Streets policy to make it standard practice to design streets for all users. • Create an Active Transportation Plan with plans for pedestrian, bicyclist and public transit. Prioritize connectivity and improvements in neighborhoods where they are most needed. • Explore a Rails to Trails project as some nearby cities have. • Where street widths allow, add low-cost bike lanes using paint, and enhance crosswalks with best practice design and signage. • Create a Food Policy Council as there is no coalition working on food policy issues. • Increase access to healthy food by creating new farmers markets, mobile food markets, and community gardens on vacant lots. • Strengthen the existing city tobacco policy and pursue new strategies to reduce the availability of tobacco products and increase enforcement. • Better enforce tobacco-free campus policies at all schools. • Partner with young people and artists on built environment project ideation and creating art that enlivens public spaces.

SECTOR & ATTENDANCE	STRENGTHS	CHALLENGES	OPPORTUNITIES
<p>Schools</p> <p>6 Focus Group Participants</p> <p>2 School 1:1 Meetings</p>	<ul style="list-style-type: none"> Paducah Independent Schools has significantly improved the percentage of high school students who are graduating college or career-ready. Paducah schools conduct biometric screenings for staff, a great source of data to track changes in employee well-being as a result of wellness efforts. Paducah Independent Schools is updating its district-wide wellness policy to add nutrition promotion and increased physical activity. County Extension program teaches nutrition in schools. Both school districts validate their menus to make sure they comply with federal standards. Many schools are sited within residential areas and some students walk or bike to school. There is a PTA or PTO in all schools within Paducah School District. Baptist Health and Four Rivers Behavioral Health provide healthcare access at certain school sites in both districts. Baptist Health has program where H.S. students get exposure to health careers. 	<ul style="list-style-type: none"> Many students suffer from stress and depression from academic demands or home environments. About 120 students are homeless. Can be hard to communicate with parents because some don't have phones. Because of an open enrollment policy allowing students to choose between Paducah Independent Schools and McCracken County Schools, the school districts are very competitive. A small group of well-being champions within the schools are called upon over and over again for health-related initiatives. For well-being efforts to be successful, need to engage a broader group of staff and teachers and show them how they can incorporate well-being efforts into what they are already doing. While many students walk or bike to school, there are no bike lanes, some new neighborhoods and schools lack sidewalks, and drivers roll through stop signs frequently. A community garden at the school district struggled to get people interested in healthy food. 	<ul style="list-style-type: none"> Encourage schools to pursue Blue Zones Worksite certification along with Blue Zones School certification to create an environment that supports well-being for teachers as well as for students. Involve students in promoting healthier foods that are served in the cafeteria by allowing them to name the foods or provide feedback/vote on new recipes. Utilize the Paducah Independent School's call system, facebook, and twitter to increase parent awareness of the school's efforts to improve well-being through Blue Zones Project. Create a Safe Routes to School Plan and start walking school bus programs at schools that are well-sited within residential neighborhoods. We heard that most Paducah Independent Schools are well-sited. Adopt a healthy fundraiser policy to move away from fundraisers that involve selling junk food. Partner with the Master Gardeners group to start school gardens at elementary schools.
<p>Individual Engagement (Civic Organizations & Media)</p> <p>18 Focus Group Participants</p> <p>2 Individual Engagement 1:1 Meetings</p>	<ul style="list-style-type: none"> Recent designation as a UNESCO Creative City has brought a lot of attention to Paducah. Group of young entrepreneurs and city leadership has brought new energy around challenging the status quo to improve the community and bring about more unity. There are many assets in the community that Blue Zones Project could partner with to support individual well-being, including Master Gardeners, community colleges that offer cooking classes, the farmers market, and many athletic facilities. History of collaboration between civic organizations and business groups on common goals. The United Way serves as a volunteer clearinghouse connecting community members to opportunities and has also helped to address community housing needs. Creative activities have historically motivated people and philanthropists to engage with the community. 	<ul style="list-style-type: none"> Paducah is a city of dualities such as "status quo/hungry for change", blue collar and service jobs/small entrepreneurs", and "from Paducah/moved to Paducah". A broad-based and broadly-appealing initiative would bring constituents together. While there is a lot of energy among young people, there are limited opportunities for young people to inform and engage in creating community change. Some community improvement efforts in the past have not moved forward because there is a group of people invested in maintaining the status quo. 	<ul style="list-style-type: none"> Involve influential leaders in the community to get broad public support for the Project, including the Mayor and other change makers from Leadership Paducah and the Chamber's Young Professional Organization. Partner with the United Way volunteer clearinghouse to host purpose workshops that allow individuals to identify the right volunteer opportunity for them. Use the farmer's market, Greenway Trail and Downtown Marina as launching points for walking groups. Given great community pride around becoming a UNESCO Creative City, draw public attention to the need for improving community well-being by highlighting that health and well-being is one of the 17 sustainable development goals for the 2030 vision for UNESCO Creative Cities. Partner with local media including the Paducah Sun newspaper and WPSD Local 6 TV station to keep the community informed about BZP and other city events.

SECTOR & ATTENDANCE	STRENGTHS	CHALLENGES	OPPORTUNITIES
<p>Faith-Based</p> <p>14 Focus Group Participants</p> <p>1 Meeting with 3 Faith-Based Leaders</p>	<ul style="list-style-type: none"> • Many health-related activities happening in faith-based organizations, including community gardens, recreational facilities, 5K's, sports camps, walking programs. • The Paducah Cooperative Ministry has dozens of member congregations and has the mission to bring together many faith-based organizations to address basic human needs and conditions. • The community kitchen and faith-based leadership breakfast are evidence of cross-church collaboration and communication. • One church has a community gardens and teaches children how to grow food. • Some churches already celebrate health and longevity with storytelling initiatives where members that are 90 years old and older tell their stories and these are shared across churches. • Race Unity Group has created an environment where community members can come together to talk about racism and ethnic separation in the community, hoping to create friendships and better understanding between different racial groups. 	<ul style="list-style-type: none"> • Getting members to attend regularly is a challenge. Twice monthly attendance is the average across most churches. • Attendance from the art community is generally low. • Faith-based organizations struggle to connect and share information amongst each other because of lack of updated membership lists. • Mental health is an issue many churches see and they don't have resources to address it or are unsure what the best approach is. 	<ul style="list-style-type: none"> • Faith-based organizations are very interested in improving the built environment so that churches can better connect with each other through walking or biking. Faith-based groups could partner with the city to prioritize and provide input into built environment improvements near them. • Partner with faith-based organizations to host cooking classes as many faith-based organizations felt that their members lacked cooking skills to eat more healthily. • Blue Zones Project could participate in Community Weekend at Carson Park and other events hosted by faith-based organizations to engage members in activities that will improve their well-being such as walking moais, potluck moais, and purpose workshops • Faith-based leaders shared that there is lots of opportunity around intergenerational mentoring. Blue Zones Project could partner older adults and seniors with students around activities like Walking School Buses, MindUp, school gardens, and other school-based well-being initiatives.



Appendix B: Greater Paducah Value Brief



Blue Zones Project® Value Brief

Greater Paducah, Kentucky

May 2017



BLUE ZONES PROJECT®
by HEALTHWAYS

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Greater Paducah: \$202 Million in Value Opportunity

Over the next ten years, *Greater Paducah has the opportunity to unlock more than \$202 million in value generation and savings*, directly benefiting employers, government entities, and the region at-large through a Blue Zones Project®.

This value is based on cumulative savings in medical expenses, improvements in workforce productivity, and additional direct and indirect benefits to the regional economy. Unlocking this value is predicated on improving well-being across the area—specifically, improving elements of individual and collective well-being that are proven to positively drive medical cost savings and productivity.

The Blue Zones Project is centered on our collective knowledge that healthier people with positive well-being cost less and perform better. Through third-party reviewed and published studies, Gallup and Healthways have proven that the status of well-being (purpose, social, financial, community, and physical) directly contributes to or subtracts from future medical costs and human performance (productivity, absenteeism, and more).

Moving the needle in a positive manner on individual and collective well-being directly results in long-term value creation from reduced future lifestyle risks, disease burden, medical spend, improved performance, and regional economic impact.

Creating Value for Greater Paducah

Over the next ten years, the impact of a full-scale Blue Zones Project intervention can result in:

- Savings of **\$94M** in direct medical expenses;
- Reductions in projected lost productivity of **\$79M**;
- **\$29M** of direct and indirect benefits to the regional economy;
- **A cumulative total of \$202M in value**; and
- **\$ 194 average annual per capita value** for the adult population.

The Origins of Blue Zones Project

Blue Zones® are places where people live measurably longer, happier lives with lower rates of chronic diseases and a higher quality of life. Scientists found five Blue Zones in different parts of the world and Dan Buettner documented these findings in the *The New York Times* best-selling book, “The Blue Zones: Lessons for Living Longer from the People Who Have Lived the Longest.” Physically, socially, and emotionally, these people are living their lives longer and better.

This research, coupled with an eight-year worldwide longevity study, has been used to develop Blue Zones Project tools and programs that help people live longer, healthier, and happier lives by improving their surroundings.

Our Approach to Community Well-Being Transformation

The Blue Zones Project ignites a broad-scale community environmental well-being transformation by making permanent or semi-permanent changes that make the healthy choice the easy choice. The Blue Zones Project initiative is unique because it is a public-private collaboration. We deploy a unifying campaign that drives changes in environments and policy by engaging employers, grocery stores, restaurants, government entities, non-profits, schools, the faith-based community, the media, and all community members.

With an extensive outreach and marketing program, we drive broad community-wide awareness and use of our tools by a diverse group of individuals and community organizations. In addition to policy and organizational work, we strengthen social connections within the community with a number of individual and group engagement strategies. Unlocking the value of the Blue Zones Project is achieved by making environmental and policy changes across community organizations, individuals, and government policy. Because of the permanent and semi-permanent nature of these changes, the value created will grow and compound over time and be sustainable.

The Blue Zones Project solution offers a comprehensive strategy and proven framework to catalyze communities to collaboratively work toward a higher state of well-being. By improving well-being, a Blue Zones Community benefits from reductions in medical costs and higher productivity, simultaneously benefiting the local and regional economy while improving individuals’ lives.

Measuring Impact

Research demonstrates the link between high well-being, reduced medical costs, and higher job performance.

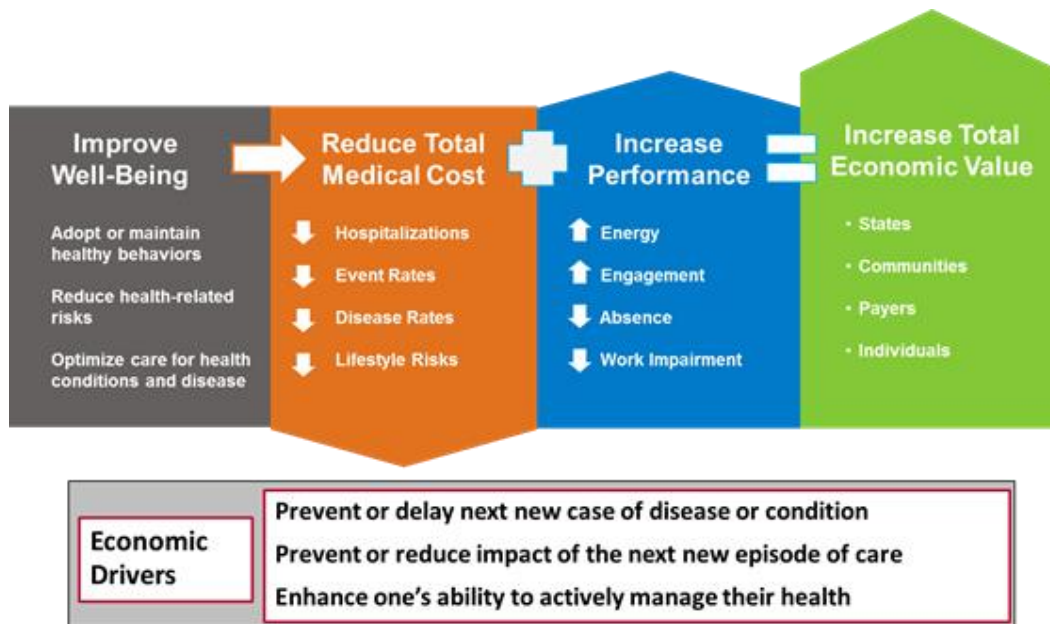


Figure 1 illustrates the odds of specific outcomes based on well-being level. Low well-being individuals are more likely to visit the emergency department, have high medical claims expenditures, leave an employer, have lower supervisor performance ratings, have unplanned absences, experience disability, and attend work without doing their best.

Optimal well-being leads to a higher-performing, healthier, and more productive individuals and businesses, thus creating economic value for the region.

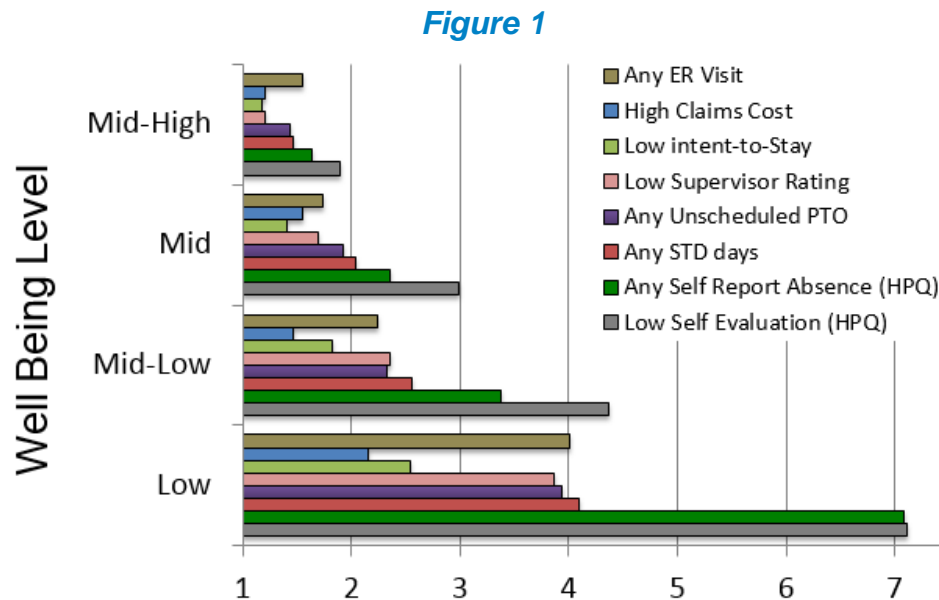


Figure adapted from: Overall Well-Being as a Predictor of Healthcare, Productivity and Retention Outcomes in a Large Employer. *Population Health Management*, 2013.

The Healthways Center for Health Research, in collaboration with the World Economic Forum, Harvard, Johns Hopkins School of Public Health, and Boston Consulting Group developed a predictive population health simulation model called the Healthways Simulation Model™. We have used the Healthways Simulation Model, in combination with several other econometric models, to generate a conservative ten year savings forecast.

The Healthways Simulation Model is an epidemiology-based model that prospectively forecasts the complex relationships that exist between chronic conditions and modifiable lifestyle behaviors. A model is needed that not only can calculate health care-related costs associated with conditions and behaviors based on a given set of data, but can also forecast the incidence and progression of these diseases over time. Research has proven the value—via reductions in medical claims costs, decreases in absenteeism, and increases in productivity (decreased turnover, costs and time of training replacement employees)—of wellness and disease interventions.

Using the Gallup-Healthways Well-being Index data and publicly available economic, health and demographic information, this proprietary tool creates a baseline of chronic disease burden as well as modifiable lifestyle risk of the population. From this baseline, the tool projects how these conditions and risk factors will interact over time and how that affects future disease burden and health-related costs.

Changes in these costs are modeled and attributed to source and type in the form of medical expenditures and changes in workforce productivity and performance. With this information, the model can accurately predict the cost of “doing nothing differently” for populations over a given period. The accuracy of this model was scientifically and independently validated using data available from the Framingham Heart Study¹, the longest-running longitudinal epidemiologic public health study of its kind.

Our advanced modeling approach included the Healthways Simulation Model, multivariate econometric models, and Coarsened Exact Matching (CEM). The Healthways Simulation Model was run with both aggressive and conservative assumptions concerning population readiness to change. Multivariate econometric models were used to estimate both limited dependent and continuous outcomes. Coarsened Exact Matching (CEM), an approach developed by Dr. Gary King at Harvard (King et al. 2012), was used to estimate savings. Monte Carlo simulation was also a part of our advanced modeling by way of incorporating the Healthways Simulation Model.

¹ Dawber, T. R. *The Framingham Study: The Epidemiology of Atherosclerotic Disease*. Cambridge, Mass: Harvard University Press; 1980.

Long-Term Well-Being Value in Greater Paducah

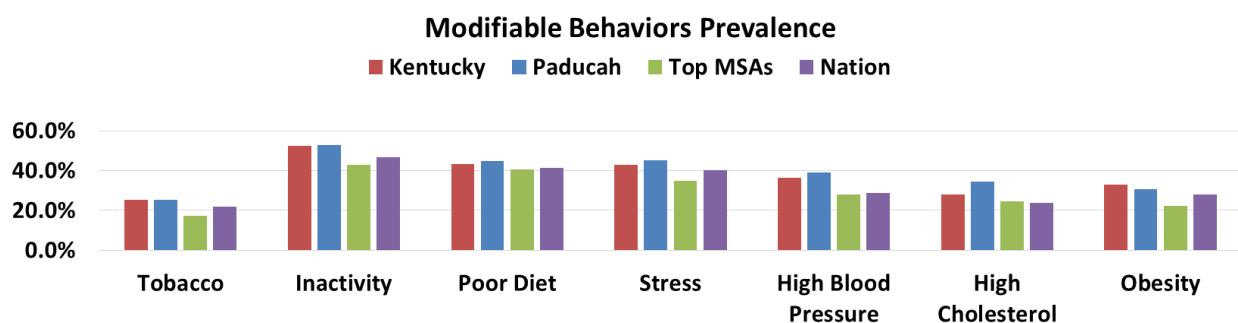
Greater Paducah's investment in the Blue Zones Project can directly create over \$202 million in value over the next ten years, including significant impacts to medical cost savings, productivity savings, and regional economic impact. This value brief provides detail on the current state of well-being in Paducah and how the Blue Zones Project can positively impact well-being through a focused and collaborative approach. This includes extensive research and forecasting performed by Healthways' Center for Health Research and Blue Zones Project.

Current State of Well-Being in Greater Paducah

The Gallup-Healthways Well-Being Index is today's "voice of the people" and the most ambitious effort ever undertaken to measure well-being across the country. Together, Gallup and Healthways have established the nation's largest well-being database that allows us to scientifically measure well-being changes at a national, state, regional, and community level year-over-year.

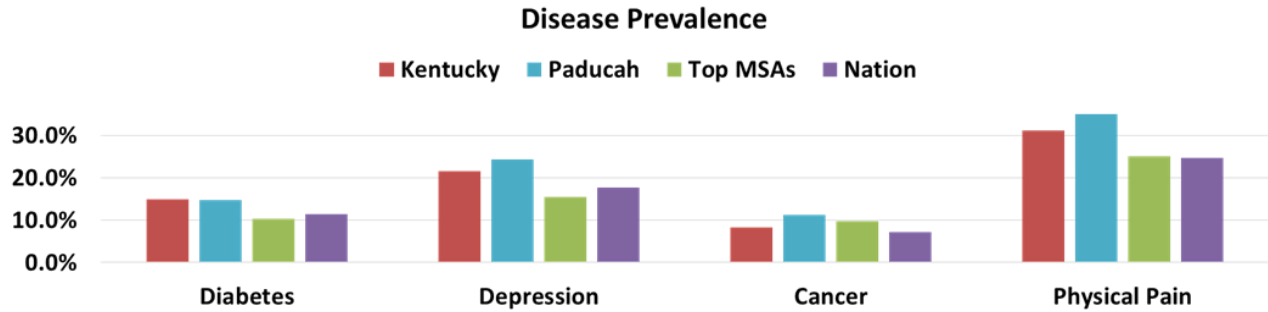
The Blue Zones Project team leveraged 2016 Well-Being Index data to identify the current state of well-being in Greater Paducah. When compared to Top MSAs* and the Nation, the Greater Paducah MSA has higher levels of all modifiable behaviors measured, including smoking, inactivity, poor diet, stress, high blood pressure, high cholesterol, and obesity. Furthermore, the Greater Paducah MSA has higher disease prevalence in all of the disease categories measured, including diabetes, depression, cancer, and physical pain when compared to Top MSAs and the Nation. Figures 2 and 3 below compare modifiable behaviors and disease prevalence between Kentucky, the Greater Paducah MSA, Top MSAs, and the Nation.

Figure 2



*The top metropolitan statistical areas are: Naples-Immokalee-Marco Island, FL; Salinas, CA; North Port-Sarasota-Bradenton, FL; Fort Collins, CO; Barnstable Town, MA.

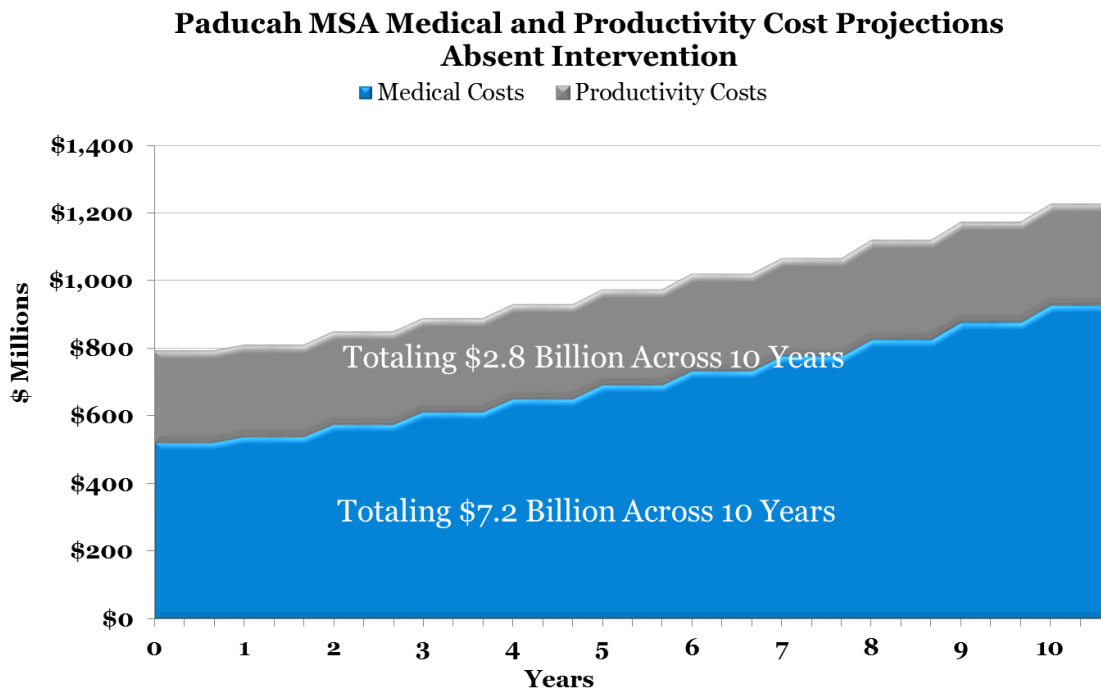
Figure 3



*The top metropolitan statistical areas are: Naples-Immokalee-Marco Island, FL; Salinas, CA; North Port-Sarasota-Bradenton, FL; Fort Collins, CO; Barnstable Town, MA.

Using the Healthways Simulation Model and other data models described above, we computed a 95% confidence interval around the mean savings opportunity associated with the Blue Zone Project. The forecast suggests that Greater Paducah struggles with many of the same chronic conditions and lifestyle behaviors that plague the entire country. The cost of “doing nothing differently” for this population is astounding. In the next 10 years, without intervention, **annual medical and productivity costs will increase by \$433 million (Figure 4).**

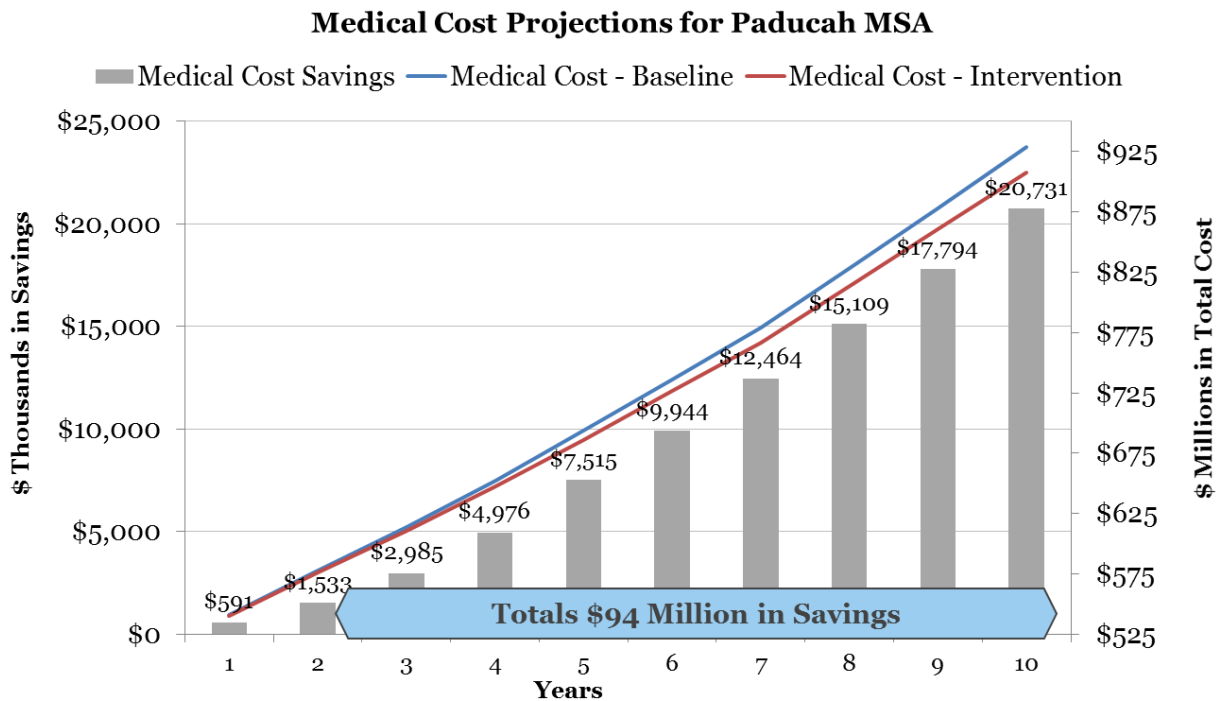
Figure 4



The Blue Zones Project Savings Analysis

Greater Paducah's **average annual per capita value is projected to be \$194 for the adult population** over ten years with a total savings of more than \$202 million over the next ten years. In reviewing medical costs alone for Greater Paducah, we project Blue Zones Project will create **\$94 million in medical claims savings over the next ten years (Figure 5).**

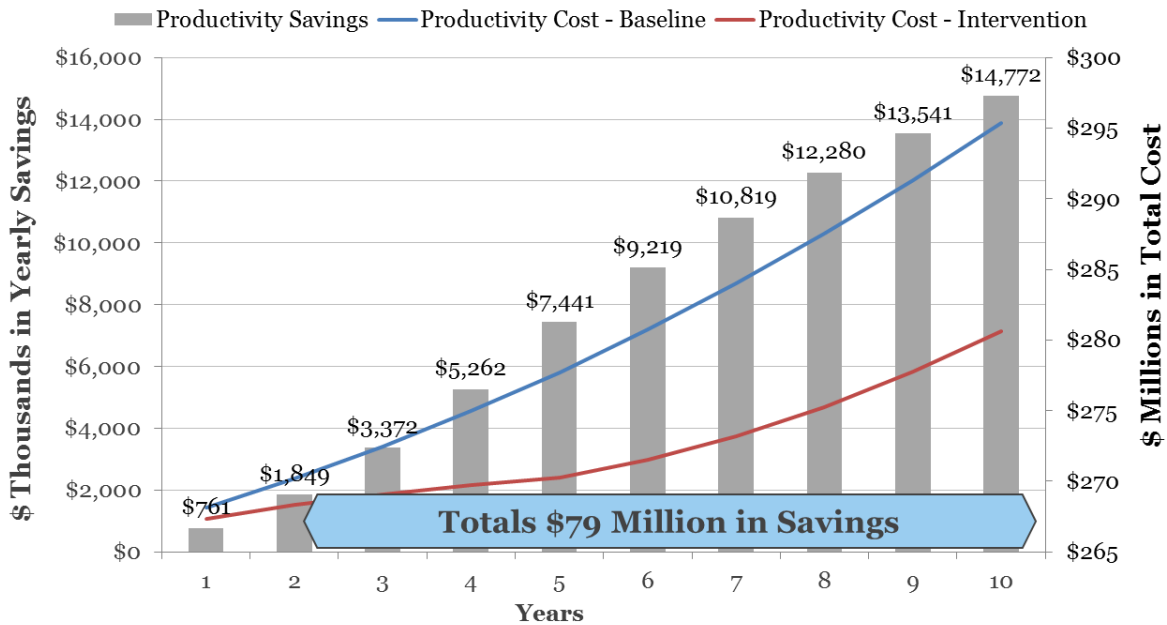
Figure 5



There is also a great opportunity to impact workforce productivity and provide significant economic benefit for Greater Paducah. Over the next ten years, the model projects the Blue Zones Project initiative to generate **over \$79 million in workforce productivity savings in the form of reduced absenteeism and increased performance in Greater Paducah (Figure 6).**

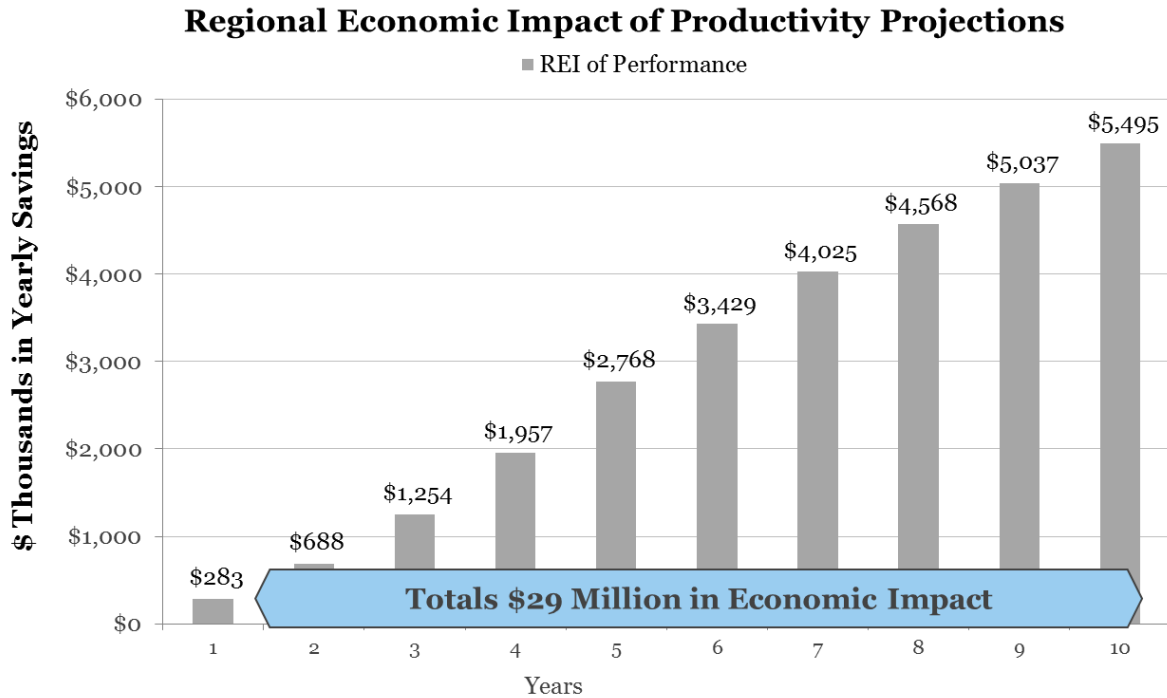
Figure 6

Productivity Cost Projections for Paducah MSA



Savings increase further when the full regional economic impacts are considered. For every dollar of improved workforce productivity the regional economy benefits in the form of increased direct and indirect household consumption. The regional economic impact from the Blue Zones Project is expected to be **more than \$29 million over ten years** (**Figure 7**).

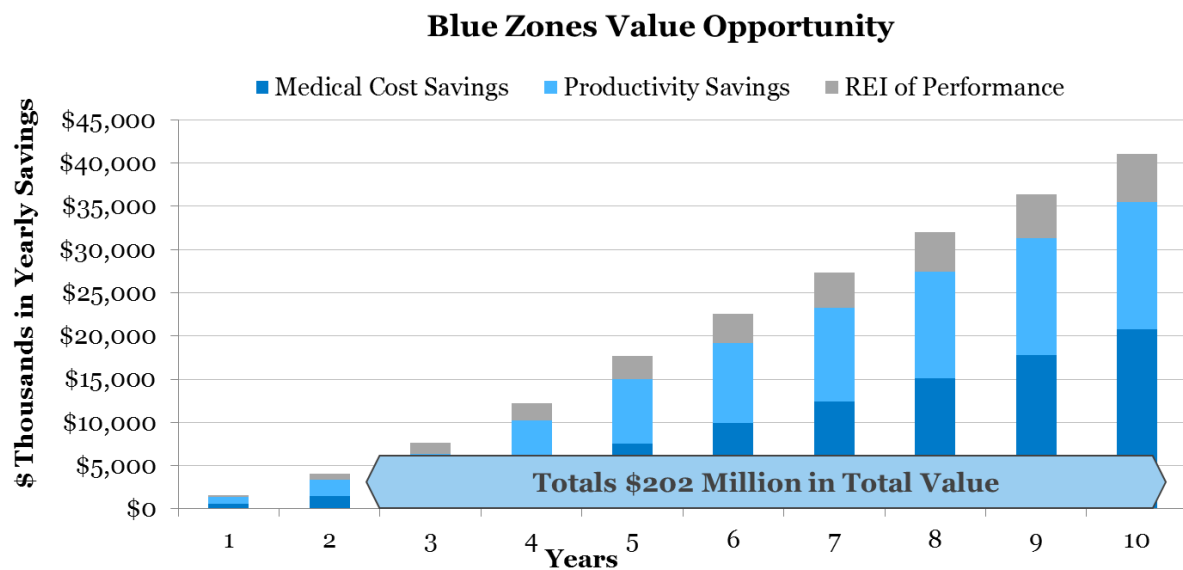
Figure 7



In total, **we project a conservative gross value estimate of \$202 million** over the next ten years as a result of implementing Blue Zones Project in Greater Paducah (**Figure 8**). Clearly, improving the well-being for the citizens of Greater Paducah will drive substantial financial and quality of life returns for the residents and employers of this community.

Figure 8

Medical	Productivity	Regional Economic
\$94 Million	\$79 Million	\$29 Million



Blue Zones Project Value Summary for Greater Paducah

The Blue Zones Project drives positive change across multiple health and well-being behaviors for an entire population. The resulting impact of well-being improvement achieved through the Blue Zones Project in Greater Paducah directly correlates to financial and economic improvements for employers, governments, and individuals across the community.

Over the next ten years, **Greater Paducah stands to benefit from saving \$94 million in total health care claims and \$79 million in direct avoided lost productivity** through the Blue Zones Project. The additional direct and indirect regional economic impacts are expected to amount to more than \$29 million over ten years. Over the first ten years, the average annual per capita value from the project is \$194 for the adult population. In total, the overall ten year value of the Blue Zones Project for Greater Paducah is projected to be more than \$202 million.

The Blue Zones Project affords the means by which to affect positive change across multiple health and well-being behaviors for an entire population. The aggregation of many beneficial impacts stemming from the Blue Zones Project has an order of magnitude impact for the regional economy supporting the community.

Greater Paducah's investment in the Blue Zones Project over the next ten years creates an attractive, sound return on investment.

* Sources: Mean wage data and employed persons estimates from Bureau of Labor Statistics (All Occupations); US Census Fact Finder for all-age population estimates applied in the per capita calculation.

** Based on the Healthways Simulation Model™, econometric models of disease incidence and well-being risk over time, observed customer outcomes, and Federal sources of economic data.

Appendix C: Discovery and Planning Phase Scope and Deliverables

Overview

To inform the implementation of Blue Zones Project, the Blue Zones Project national team will conduct a discovery and planning phase in the community to identify the community's current state of well-being, existing initiatives, strengths, and opportunities for success and to engage community leaders and residents to inform the Project's implementation. The discovery and planning phase includes several milestones; however, the phase will culminate in the adoption of a community Blueprint, a detailed implementation plan with goals, strategies, and metrics to guide implementation of Blue Zones Project over the coming years. The following details the scope of work, deliverables and timeline associated with this phase.

DISCOVERY PHASE MEETINGS & REPORT

The Blue Zones Project team will conduct a series of one-on-one and group community meetings to assess the strengths, opportunities, and current initiatives underway in the community. These meetings will familiarize key leaders from various sectors with Blue Zones Project and assess their interest in actively participating in the project. The early support of key leaders is critical to the success of Blue Zones Project as these leaders will drive participation in future stages of the project.

The agenda and schedule of meetings will be developed jointly between the Blue Zones Project team and local sponsor. For communities that have already experienced a 2-day Site Visit, the Blue Zones Project team will conduct one-on-one meetings with community leaders that have yet to be introduced to the Project. For a full list of stakeholders engaged during the on-site meetings, see Discovery Meetings Stakeholder List.

One-on-One Meetings with Community Leaders

- Mayor
- City Council/Town Board
- City Manager
- School Superintendent
- School Board
- University/college President
- CEO/President of health system

- Director of Public Health Department
- President of Chamber of Commerce/Local Business Association
- CEOs of top employers
- Owners/managers of major Grocery Stores
- President of Restaurant Association or influential restaurant owners
- Faith-based community leaders
- Major Media Outlets-television, radio, print
- Other identified community leaders and stakeholders

Focus Groups & Networking Events

In addition to one-on-one meetings with key leaders, the Blue Zones Project team will organize focus groups and networking events to gather input on strengths and opportunity areas from key leaders in the business, school, and faith/civic/non-profit sectors.

Focus Groups

- Schools
- Faith-Based, Civic, and Non-Profit Organizations

Networking Events

- Employers and business associations

Discovery Phase Report

Based on learnings from the on-site meetings, Blue Zones Project will compile a discovery phase report summarizing current initiatives underway and strengths and opportunities for implementing a Blue Zones Project initiative. This document will inform the community Blueprint, a detailed implementation plan with action items and metrics to guide community transformation.

GALLUP-SHARECARE WELL-BEING INDEX

During the discovery and planning phase, Blue Zones Project will assess the current state of well-being in the community using the Gallup-Sharecare Well-Being Index® (WBI). The WBI is the official measurement tool for Blue Zones Project. It is the first-ever comprehensive assessment of residents' health and well-being and more than two million WBI surveys have been completed to-date. Blue Zones Project will conduct a baseline survey of the community and regular surveys thereafter to assess progress over time.

COMMITTEE FORMATION

Steering Committee and Leadership Team

Early on in the discovery and planning phase, Blue Zones Project will recruit community leaders to serve on the Steering Committee and Leadership Team. These groups serve in an advisory role throughout the Blue Zones Project implementation period. The Blue Zones Project staff will meet with these

committees to guide them as they write the Blueprint, or community workplan, for improving well-being. After the Blueprint is written, the Steering Committee will continue to serve in an advisory role while the Leadership Team will serve as co-chairs of sector and engagement committees responsible for developing action plans to implement the Blueprint.

Sector Committees

Blue Zones Project staff will work with the Leadership Team to identify community members to serve on sector committees. Sector committees are formed for each area that Blue Zones Project focuses on, including policy, worksites, schools, restaurants and grocery stores, faith-based organizations, and individual engagement. Committee members typically hold decision-making power or influence within their sector so that they can be effective advocates for the Blue Zones Project strategies and activities within their sector. After the Blueprint is written by the Steering Committee and Leadership Team, Sector Committees create detailed action plans for implementation and drive the work.

POLICY CHARRETTES

To become a Blue Zones Community, a community must adopt a critical mass of policies and projects in three policy areas: Built Environment, Food Environment, and Tobacco Environment. During the discovery and planning phase policy experts and Blue Zones Project staff will lead charrettes in each of the three policy areas. A charrette is a meeting that brings multiple stakeholders together to collectively identify solutions that fit a community's unique characteristics and needs. Following each policy charrette, the expert facilitators will produce a report summarizing the discussions and collective priorities along with helpful resources like model policies and case studies. A community policy committee comprised of city staff and community members will guide the work to ensure that priority policies and projects get adopted and implemented.

BLUEPRINT DEVELOPMENT

Blue Zones Project staff will guide the Steering Committee and Leadership Team to draft and adopt the community's Blueprint, the implementation plan for community transformation. The Blueprint includes an overview of the current well-being environment and specific goals, objectives, strategies, and metrics that will be used to engage policy makers, organizations, and residents in a community-wide effort to improve well-being. The Steering Committee and Leadership Team update the Blueprint annually to ensure that the coming year's goals and strategies are informed by the latest Gallup-Sharecare Well-Being Index survey results and the community's progress to date to key initiatives.

COMMUNITY AWARENESS & MARKETING CAMPAIGN

During the discovery and planning phase, Blue Zones Project will deploy a robust community awareness and marketing campaign to generate excitement and engagement with Blue Zones Project prior to implementation. The campaign includes a customized website, social media posts, and stories in local news outlets.

LOCAL STAFF TEAM

A local staff team will be hired to drive implementation of Blue Zones Project over the coming years. Blue Zones Project prefers to hire individuals from the community as these people have an intimate knowledge of the community's history, strengths, and opportunity areas and have relationships across the community that will drive engagement with the Project. The local staff team is supported by the Blue Zones Project national team on an ongoing basis and national experts in food policy, tobacco policy, and built environment are leveraged to assist in the policy charrettes and policy implementation.

DELIVERABLES

- Completion of discovery phase meetings that build interest and commitment with key community leaders.
- Completed discovery phase report summarizing current initiatives underway and strengths and opportunities for implementing a Blue Zones Project initiative.
- Completed Gallup-Sharecare Well-Being Index survey in the community to establish a baseline measurement of community well-being.
- Formation and training of Steering Committee, Leadership Team, and Sector Committees.
- Completed Blueprint detailing goals, objectives, strategies, and metrics for each sector and individual engagement strategy within the Blue Zones Project community transformation model.
- Deployment of community awareness and marketing campaign.
- Hiring and onboarding of local staff team.

SPONSOR RESPONSIBILITIES

- Support coordination of on-site meetings including identifying and securing key leadership participation and helping secure venue space.
- Participate in on-site meetings and follow-up discussions by serving on the Steering Committee and attending Blue Zones Project community events.
- Leverage communication channels to generate community awareness and engagement.

APPROXIMATE TIMING

Timelines for the milestones below will overlap; therefore, the total time for the discovery and planning phase is less than the sum of the timeframes for each milestone.

Planning for Discovery Meetings	1 Month
Discovery Meetings	2 Weeks
Discovery Report Preparation	2 Weeks
Gallup-Sharecare Well-Being Index Surveying	3 Months
Committee Formation & Training	6 Weeks
Policy Charrette Planning and Completion	2 Months
Blueprint Development	6 Weeks
Community Awareness and Marketing Campaign	4 Months
Local Staff Hiring & Training	4 Months
TOTAL:	4-6 Months

DISCOVERY AND PLANNING PHASE STAKEHOLDER LIST

One-On-One Meetings with Key Leaders

- Mayor
- City Council/Town Board
- City Manager
- School Superintendent
- School Board
- University/college President
- CEO/President of health system
- Director of Public Health Department
- President of Chamber of Commerce/Local Business Association
- CEOs of top employers
- Owners of major Grocery Stores
- President of Restaurant Association or influential restaurant owners
- Major Media Outlets-television, radio, print

Schools Focus Group

- School Principals
- PTO/PTA representative
- Teachers union representative
- School Nutrition Director
- School Athletic/PE Director
- School Nurse/Health Director
- Parents

- School food vendors
- Student government representatives
- School garden groups

Faith-Based/Civic/Non-Profit Organizations Focus Group

- Representatives from predominant faith based organizations
- Pastor associations and groups
- Church groups and associations
- Faith-based colleges and universities
- Volunteer organizations
- Non-profit organizations
- Neighborhood Associations
- Civic organizations
- City/County Volunteer Coordinator
- YMCA's, Boy's and Girl's Clubs and other youth groups
- Community foundations

Employers and Business Associations Networking Event

- CEOs from top 20 largest or most influential worksites
- Human Resources representatives
- Company wellness leaders
- Chamber of Commerce
- Business Associations
- Health system representatives
- School district representatives
- Fire and Police representatives
- City representatives

Appendix D: Blue Zones Project Community Model

Blue Zones Project will provide the foundational elements required to transform communities into Blue Zones Communities. By initiating Blue Zones Project in demonstration communities, we will catalyze the community transformation efforts by demonstrating early success and momentum. This section describes the Blue Zones Project model that will be implemented. The community transformation process will occur across three defined phases:

1. Discovery and Planning Phase
2. Implementation, Management and Innovation Phase
3. Sustainability Phase

Discovery and Planning Phase

To determine an appropriate deployment of Blue Zones Project, Blue Zones Project staff will facilitate a series of meetings with key leaders and stakeholders in each community to ascertain its current state, readiness for change, and opportunities for success in undertaking a Blue Zones Project transformation initiative.

These stakeholder meetings are essential for laying a foundation for the Blueprint. The Blueprint is the strategic implementation plan for community transformation. It is a 60+ page document that maps out key well-being findings from the Gallup-Sharecare Well-Being Index, the selected strategies for the community, the leaders to drive that work, and high level work plans for the first year and beyond. The Blueprint is updated annually and guides the community transformation to increase well-being.

Activities

- Hiring and training locally based Blue Zones Project Staff
- Assembling and training local leadership on the project and how to complete their Blueprint
- Coaching the recruitment of the 100+ core volunteers to serve on committees and training them on how to implement their sector strategies
- Conducting Gallup-Sharecare Well-Being Index baseline. The baseline data is used both to evaluate opportunities to improve well-being and to measure the progress each year.
- Conducting food policy, built environment, and tobacco policy environmental analyses of the current state and policy summits that guide community leaders toward setting key priorities for policies, projects and solutions targeted at changing the food, built, and tobacco environments.

Deliverables

- Completion of discovery phase meetings that build interest and commitment with key community leaders.
- Completed discovery phase report summarizing current initiatives underway and strengths and opportunities for implementing a Blue Zones Project initiative.
- Completed Gallup-Sharecare Well-Being Index survey in the community to establish a baseline measurement of community well-being.
- Formation and training of Steering Committee, Leadership Team, and Sector Committees.
- Completed Blueprint detailing goals, objectives, strategies, and metrics for each sector within the Blue Zones Project community transformation model.
- Deployment of community awareness and marketing campaign.
- Hiring and onboarding of local staff team.

Implementation, Management and Innovation Phase

The project fully kicks off upon completion of the Blueprint. Over 13 strategies (pillars) will go into full operation, engaging the various sectors and citizens. The implementation process is led and managed by the Blue Zones Project team.

Activities

Implementation of pillar strategies focused on eight sectors and five initiatives as outlined below:

- Sectors
 - Engage city government to adopt policies and practices.
 - Engage the faith based community to help their members adopt healthier behaviors.
 - Engage restaurants to become Blue Zones Approved Restaurants to make subtle and obvious changes to nudge customers to healthier behaviors.
 - Engage grocery stores to become Blue Zones Approved Grocery Stores and make healthy choices easier.
 - Engage corner stores in Blue Zones Project and make healthy choices easier.

- Engage schools to become Blue Zones Approved Schools by adopting policies and practices that improve student physical, nutritional, and educational outcomes.
- Start Walking School Buses at elementary schools so chaperones walk children to school on a set schedule, providing physical benefits for the children and physical and social benefits for the chaperones.
- Engage leading community employers to become Blue Zones Approved Worksites in an effort to drive improved productivity and well-being.
- Initiatives
 - Engage individual citizens to sign a Personal Pledge and improve their well-being by taking actions inspired by the Blue Zones Project Power9 principles.
 - Moais: Engage people to form small groups focused on healthy behaviors
 - Purpose Workshops: Provide individuals an opportunity to explore and discover their purpose
 - Volunteer Program: Create the volunteer base needed to support Blue Zones Project and encourage volunteerism in the community
 - Public Awareness/Media: Generate community awareness and participation in Blue Zones Project through media stories in the highest visibility local media channels.

Deliverables

- Promotional events and community kick-off held
- Pledges and support materials for each sector
- Materials and processes to support all initiatives including:
 - Playbooks for sector work
 - Committee and volunteer training to implement initiatives
 - Turnkey marketing materials, engagement plan and collaterals
 - Access to web-based tools and resources
- Ambassador and speakers bureau programs
- Access to national experts
- Implementation of the Pillars

Sustainability Phase

The final months of implementation are spent completing a transition plan to equip the local leaders to sustain their efforts after the departure of Blue Zones Project staff. Core to the Blue Zones Project staffing model is using and training local volunteer staff during the project. They are then equipped to operate selected ongoing strategies identified in the sustainability plan. Depending on priorities, the plan will frame recommended resources needed and assist the community in conversations to support the roles and resources. Blue Zones Project will support continued work in the community via access to experts and a regional support infrastructure.

Activities

- Planning meetings with community leadership to identify support going forward

Deliverables

- Exit assessment and transition plan
- Ongoing evaluation of progress
- Access to annual Blue Zones Summit and/or Institutes
- Continued access to product materials, tools and resources

Appendix E: 4D Approach to Built Environment & Food Policy

Discover - Phase 1

In the Discover Phase, the Blue Zones team audits the built environment to assess the strengths, challenges and opportunities. This phase engages key stakeholders to specify goals and desired outcomes. The Blue Zones team also reviews existing policy documents, capital plans and strategic initiatives to help avoid costly mistakes. The Discover Phase includes:

- Pre-Event Document Review (Policies, Capital Projects and Redevelopment Plans)
- On-Site Community Audit and Focus Group Meetings
- Post-Event Report of Findings

Develop - Phase 2

The Develop Phase builds capacity for active community environments by offering technical training for staff and key partners. The Blue Zones team will lead a training workshop for cross-departmental staff focused on:

- Active Transportation Tools
- Land Use Planning Best Practices
- Public Engagement Strategies
- Building Capacity for Active Transportation Efforts
- Prioritizing Improvements for Cost Savings
- Forming a Built Environment Steering Committee
- Identifying a Specific Project for the Active Living Summit

Design - Phase 3

During the Design Phase, the Blue Zones team assists the community in planning and facilitating one marquee Active Living Summit to advance a model project that encourages active transportation and living. Active public participation and community partnership are embedded into every step of the summit—people who live, work, shop, play and go to school in a community are the experts.

- Summit Planning and Facilitation
- Outreach Materials including Flyers and Web Announcements
- Photo-Vision Renderings
- Next Steps Active Living Toolkit

Deploy - Phase 4

The Deploy Phase ensures key support is available to assist the community in moving active living projects and policies forward. This may include:

- On-Call Technical Assistance
- Design Summits and Workshop Facilitation
- Other Public Engagement and Capacity Building Assistance
- Policy Writing Support
- Peer Design Review
- Funding Proposal Development
- Training, Presentations and Interviews

Discover - Phase 1

The Food Policy Discover Phase identifies relevant food policy stakeholders, assesses the state of the community/region's food environment, and determines the change readiness of stakeholders to undertake food policy work. The Discover Phase includes:

- Understanding Assets
 - BZ FTE Shadows
- Underground work
 - Change Readiness
- 1 on 1 visit
 - Maggie Interviews BTE
- Phone calls
 - Food FactFinder Worksheet
- Facilitated conversations
 - (demographic data, policy review)
- Know: Success, Challenges

Develop - Phase 2

The Develop phase involves sharing information, laying groundwork, and engaging key partners to plan a successful food policy summit.

The Develop Phase includes:

- Transfer Knowledge to BZ Team (2 calls)
- Align with Jenn Furler
- Identify Leaders (educate, engage, interact)
- Food Policy Menu conference call to review
- Identify top stake holders to invite to food summit
- Form BZ FPG

Design - Phase 3

The Design phase includes a daylong Summit, where BZ team members and community influencers learn about the food environment and identify relevant food policy priorities; creation of a long-term workplan; and ongoing technical assistance and support. This phase includes:

- Food Summit (6 hour)
 - Consolidate BZ FPG
- 4 specific policies
 - Annual Workshop (pre blue print)
- 4 specific programs
 - Quarterly Coaching Calls
- 3yr work plan
 - Affinity Community

Deploy - Phase 4

The Deploy phase provides multi-faceted technical assistance and capacity building to support successful implementation of the BZ food policy agenda. The Deploy Phase is the culmination of work from the previous two years:

- Annual Workshop
- Policies Implementation
- Programs Launched

Appendix F: Blue Zones Project Governance, Volunteer Roles, and Job Descriptions

Governance: Steering Committee

- **Purpose:** The Steering Committee will guide the development of the Blueprint for the Blue Zones Project and act as a sounding board for the Leadership Team. This team of community leaders will also help break down barriers and make connections with key citizen volunteers to facilitate the implementation of the Blueprint. Team members may also be asked to help resolve specific conflicts on an as-needed basis.
- **Steering Committee Members:** The Steering Committee consists of key civic leaders who are representative of the breadth of the community. These are local men and women who have been recognized publicly for their commitment to the community and have played active roles in the civic arena over a number of years. They understand how to get things done, and have a proven history of making things happen in their community.
- **Time Commitment:** It is expected there will be approximately two or three two-hour meetings per month in addition to time for assignments between meetings for the first five months. Throughout this period, your community will be working through training, planning, and implementing the Blueprint. Eventually, this will change to a monthly or quarterly meeting until the annual Blueprint update process begins. Updates take significantly less time than creating the initial Blueprint. There may also be an occasional meeting around a specific focus area for a subset of the group, as well as opportunities to help drive specific initiatives based on individual team members' interests, skills, and availability.

Area	Expertise	# of People
Government	Former mayor or city council members (not running for election)/city planning officials	2
Business	Past/current chamber of commerce president/leaders from large companies	2
Schools	Past superintendent of schools/ former school board member	1
Healthcare/ Public Health	Key role in a local hospital, healthcare provider group, or public health agency	1
Food System	Understanding of the supply chain opportunities and challenges for moving locally grown food into the mainstream distribution channels	1
Other	To be determined based on additional need	0–2

**Note: these are EXAMPLES of the types of expertise we may want to see in a role. They should serve as a guide.*

Volunteer Roles

Leadership Team (Committee Co-Chairs)

Blue Zones Project communities implement several strategies and activities designed to create permanent changes to policies, social networks, and the community as a whole. These efforts will help drive people toward healthy behaviors, improve their overall well-being, and make the healthy choice the easy one. Each of these strategies and activities is planned and implemented by a sub-committee of local volunteers led by co-chairs. The use of co-chairs is intentional because research shows that community-led initiatives have higher rates of success when two or three people share leadership responsibility. Most notably, it reduces the likelihood of a committee stalling if a leader is absent.

- **Purpose:** The Strategy Committee includes one co-chair from each sector committee and coordinates across the sectors.
- **Strategy Committee Members:** The committee should consist of well-connected, well-organized, and highly motivated civic people. Committee members do not necessarily need to be people in official roles of government or business. What is most important is having the eagerness and leadership skills to help change the community. In general, it is discouraged for currently elected officials or people pursuing an elected position to sit on the Strategy Committee. The Strategy Committee is led by co-chairs. They may serve in just this role or also as a co-chair of a sub-committee.
- **Time Commitment:** This will vary by role, but it is not expected to exceed two to four hours/week. The group will likely meet at least once per month. There will be more meetings at the beginning and then the meetings will spread out.

Implementation Committee Members

Blue Zones Project communities implement several strategies and activities designed to create permanent changes to policies, social networks, and the community as a whole. These efforts will help drive people toward healthy behaviors, improve their overall well-being, and make the healthy choice the easy one. Each of these strategies and activities is planned and implemented by a sub-committee of local volunteers led by co-chairs.

- **Purpose:** Sector committee members plan and implement a strategy or activity to improve well-being.
- **Skills:** Sector committee members need to be able to plan overall implementation of a strategy

or activity. Members need to be great team players, taking on assignments and getting them done. Specific knowledge and relationships vary based on the committee. Details are below. In general, committee members should:

- Be willing and able to give necessary time to attend meetings and perform duties
 - Get acquainted with the chair and other members
 - Review the agenda and meeting materials prior to attending meetings
 - Participate in discussions
 - Respect others' opinions
 - Be objective
 - Think communally rather than individually
 - Stay on the subject and ask for clarification
 - Accept and follow through with agreed-upon assignments
- **Time Commitment:** Committees will meet regularly, with peaks of intensity to plan kickoff or other events. Typical commitment is roughly two hours per week. Ideally committee members make a one-year commitment.

Goal/Purpose	Member Expertise	Focus Area
Steering Committee		
Guide the development of the Blueprint, act as a sounding board for the Strategy Committee, and make connections to facilitate the implementation of the Blueprint, resolve conflicts as-needed.	Proven history of leading positive change in the community. Well respected in the community	Overall Strategy
Strategy Committee		
Ensure coordination across the strategies. Get input as needed from Steering Committee.	Team leadership and coordination.	
Community Policy Committee		
Build public support for public agencies completing sufficient work to become a certified Blue Zones Community.	City planning and strong interest in biking and/or walking, food policy, or tobacco policy. <i>Members: City staff, commission members, community members, and stakeholder group representatives. This may be divided into separate committees for built environment, food policy, and tobacco policy.</i>	Community

School Policy Committee		
To assist schools in becoming approved; likely includes advancing policy support at the school board level.	Experience working with schools/policymaking. <i>Members: Wellness Council representatives, principals and other school leadership, PTA, active parents, professionals in field of education, fitness, and nutrition.</i>	Community
Goal/Purpose	Member Expertise	Focus Area
Restaurant Designation Committee		
Recruit and help support 25% of locally owned restaurants to become approved Blue Zones Restaurants™.	Restaurateur or interested party willing to help organize other restaurants to receive training to optimize menus/environment. <i>Members: Restaurateurs (managers, owners, chefs), nutritionists, food marketing experts, and “foodies.”</i>	Organizations
Grocery Store Designation Committee		
Recruit and help support 25% of grocery stores to become approved Blue Zones Grocery Stores™.	Interest/ability to work with local grocery stores to highlight healthy foods. <i>Members: Grocers (managers, owners, deli managers, etc.), nutritionists, food marketing experts, and “foodies.”</i>	Organizations
Worksite Designation Committee		
To support worksites becoming approved and achieving a sufficient threshold to become a Blue Zones Community.	Interest in working with worksites to improve well-being. <i>Members: Representatives of worksites in management, HR, people who are passionate about worksite wellness, chamber of commerce and other business association representatives, and worksite wellness professionals.</i>	Organizations
Goal/Purpose	Member Expertise	Focus Area
Purpose Workshops Committee		
Plan purpose workshops, recruit organizations to host workshops, and support the purpose moais.	Ability to plan, schedule, and implement events. <i>Members: People interested in purpose, professionals in related fields (faith-based leaders, therapists).</i>	Individual
Volunteering Committee		
To recruit volunteers to support every aspect of the Blue Zones Project.	Ability to organize volunteers and help people align their time and talents with community needs.	Individual

	<i>Members: People passionate about recruiting and supporting volunteers, and volunteer coordinators.</i>	
Engagement Committee		
To engage community members in completing personal pledges and general engagement across all strategies.	Inspiring and inviting people to participate in the Blue Zones Project. <i>Members: Enthusiastic recruiters, event planners, networkers, media/public relations professionals, cooking-class champions, faith-based leaders, and neighborhood gathering leaders.</i>	Individual
Moais Committee		
Launch a dynamic group experience that builds teams of people exploring the community on foot or other healthy activities.	General coordinating/ organizing skills. Interest in creating small groups around walking, purpose, dining. <i>Members: Current participants in the Walking Moai program, event planners, people interested in walking, and parks and recreation staff.</i>	Individual

Job Descriptions

**Staffing model and number of staff in each role to be vetted during the Discovery and Planning Phase.*

Community Program Manager / Executive Director

- **Role:** This person provides operational leadership for the local team and drives specific initiatives with the committee co-chairs. This person also drives the policy and schools work.
- **Expertise:** This person has strong knowledge of the community and is well respected as a civic leader who can get things done. This person is well-organized, an experienced team leader and has strong written and verbal communications skills. They will be a key face of the project to the community.
- **Time Commitment:** Full-time for the duration of the project

Project Manager

- **Purpose:** This person provides operational leadership for the local team and drives specific initiatives with direction from the Program Manager. This person is also responsible to transitioning to a sustaining mode when the Blue Zones Community team phases out.
- **Expertise:** This person has strong knowledge of the community and is well-respected as a civic leader who can get things done. This person is well-organized and has strong written and verbal

communications skills. This person will be a key face of the project to the community.

- **Time Commitment:** Full-time for the duration of the project

Organization Lead

- **Purpose:** This person provides local support for employers, restaurants, grocery stores and faith based organizations as they work toward making the environmental changes needed to become a Blue Zones Project Community.
- **Expertise:** This person is responsible for the successful advancement of the Blue Zones Project in the community through engaging employers, restaurants, grocery stores and faith based organizations. This person will possess business and scientific skills and have proven success working with employers and worksites to implement change.
- **Time Commitment:** Full-time for the duration of the project

Engagement Lead

- **Purpose:** This person is responsible for the execution of the local engagement plan in a Blue Zones Project Demonstration site community. This person will work to maximize local participation and engagement from individuals and organizations.
- **Expertise:** This person has strong knowledge of the local media and public relations environment and will coordinate the delivery of collaterals and promotional activities (on-line/off-line) to drive program participation of the local citizens based on a high-level engagement strategy developed by the Blue Zones Project team. Public speaking experience also preferred.
- **Time Commitment:** Full-time for the duration of the project

Appendix G: Blue Zones Project Certification Process, Criteria and Pillars

Blue Zones Community Certification

Communities that have been selected as a Blue Zones Project® Demonstration Community following a Discovery or a Community Selection Process and have demonstrated commitment from critical community leadership can work to achieve certification as a Blue Zones Community®. We offer a 2-step Certification process assuring that communities, in collaboration with Healthways and Blue Zones, LLC teams, achieve minimum process and outcome goals. The goals are designed to convey significant economic benefits to the community.

Description	Certification Criteria
Achieve certification as a Blue Zones Community	<p>Step 1) Complete all minimum certification criteria outlined in the Pillars table below.</p> <p>Step 2) Achieve at least:</p> <ul style="list-style-type: none"> a) Six self-reported, measurable improvements that your Steering Committee attributed to the Blue Zones Project, <u>and</u> b) In comparison to baseline Well-Being Index scores, a community must achieve a net statistically significant improvement of +8 across the 20 measures from the Well-Being Index with no more than 4 measures declining. <p><i>Note: both steps require full validation review and site visit</i></p>

Pillars

Philosophy and Approach

Providing clear objectives and criteria for our communities and Blue Zones Project teams is important to achieving the outcome of community transformation toward higher well-being. It is the philosophy of Blue Zones Project to build upon the good work-taking place in a given community and recognize that the scale, geographic boundaries or other unique characteristics of a community may call for adjustments in the application of the Pillars. The following criteria establish targets for each pillar for initial certification as a Blue Zones Community. Please see Pillars listed on the following page.

Pillar	Pillar Title	Certification Criteria
Policy		
1	Built Environment & Active Living	Select and implement 9 total policies, including 6 core policies and 3 additional policies, AND Implement one marquee project—which demonstrates a visible change to the build environment
2	Food Policy	Adopt at least 3 short-term policies and 2 long-term policies
3	Tobacco Policy	Adopt at least 2 short-term policies and 1 long-term policy
Places		
4A	Schools	At least 50% of public schools become Blue Zones Project Approved
4B	Walking School Bus / Safe Routes to Schools	25% of participating elementary Schools implement one of the following: <ul style="list-style-type: none"> Walking school bus Complete a new Safe Routes to School Program (4 safe routes to school per participating school) Institute a Bus-to-Walk Program
5	Restaurants	At least 10% of all restaurants become Blue Zones Project Approved
6A	Grocery Stores	At least 25% of grocery stores become Blue Zones Project Approved
6B	Corner Stores	None at this time. Corner store pledge currently in pilot phase.
7	Worksites	Achieve <u>one</u> of the following: <ul style="list-style-type: none"> If community is less than 100k in population, then 10 of the top 20 worksites by number of employees If community is more than 100k in population but less than 250k, then 25 of the top 50 worksites by number of Employees If community is more than 250k in population, then 50 of the top 100 worksites by number of employees A sufficient number of employers to represent 25% of the workforce become Blue Zones Project Approved
8	Faith-Based Organizations	Achieve <u>one</u> of the following: <ul style="list-style-type: none"> If community is less than 100k in population, then 10 of the top 20 faith-based organizations by number of members If community is more than 100k in population but less than 250k, then 25 of the top 50 faith-based by number of members If community is more than 250k in population, then 50 of the top 100 faith-based by number of members A sufficient number of faith based organizations to represent 25% of the faith-based membership become Blue Zones Project Approved
People		15% of the population age 15 and older participates in an approved activity
9	Engagement Speech	Individuals participate in the engagement speech delivered by a certified speaker and complete a personal pledge
10	Moai Participation	Individuals participate in Walking, Potluck, Restaurant, or Purpose Moais by completing the 10 week program
11	Purpose	Individuals participate in a Purpose Workshop
12	Volunteering	Individuals participate in a curated volunteer experience and actively volunteer or volunteer for Blue Zones Project

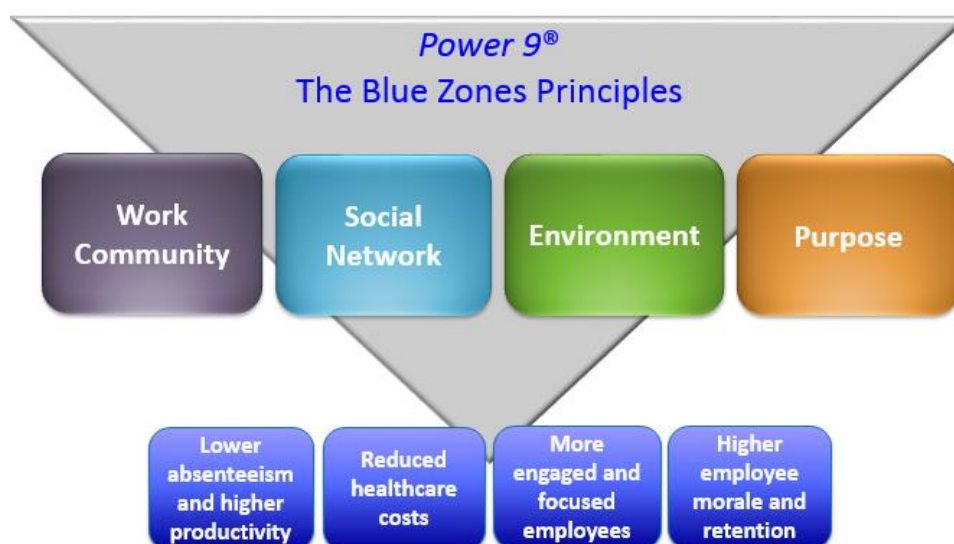
13	Public Awareness/ Media	<p>Achieve one of the following:</p> <ul style="list-style-type: none"> • 10 media stories in the highest exposure channels (TV, print, and/or radio) throughout the duration of the project • Signed partnership agreement for Public Service Announcements throughout the duration
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Appendix H: Certified Blue Zones Worksite Model

By implementing the Certified Blue Zones Worksite Model, Healthways envisions that employers will dynamically transform their work environment and take the first steps in broader community well-being transformation. We envision a future where you as an employer are the progressive industry leader in workplace well-being and your employees are actively engaged in the workplace and strong ambassadors for well-being transformation in your community.

Over the years, our environments—the places we live, work, and play—have evolved in a way that makes healthy choices harder to find. This evolution has resulted in poor health and well-being. With the Blue Zones Project, Healthways and Blue Zones have partnered to transform these environments so that the healthy choices are the easiest ones for people to make.

By combining Blue Zones Power 9 principles with Healthways' well-being research on worksite engagement and productivity, we have created the Certified Blue Zones Worksite Model, where businesses and their employees flourish within an environment that supports healthy choices. The framework of the Certified Blue Zones Worksite Model is based on optimizing the work community, employee social network, and physical environment, while connecting employees to their own purpose within the context of their work. Through this framework, we enable each employee to take control of his or her well-being. The results are higher employee performance, reduced long-term health care costs, stronger employee engagement, and higher employee morale and retention.

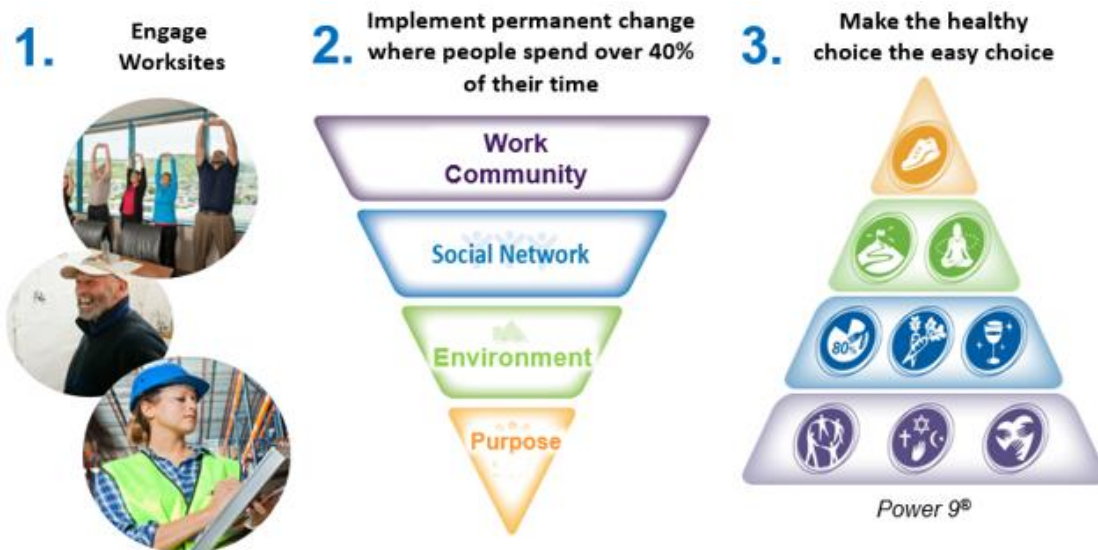


Outcomes are measured through scientifically-founded tools including the Gallup-Sharecare Well-Being Index® and the Well-Being 5™ survey, as well as third-party validated research conducted by Healthways' Center for Health Research. The Well-Being 5 survey was developed to measure well-being across five integral domains: purpose, social, financial, community, and physical. The Survey's comprehensive scope allows for in-depth insights into well-being improvements and a clear measure of overall success.

According to a 2014 study¹ by the United States Department of Labor, employees typically spend 40% or more of their time in a workplace setting or at a worksite. Often these individuals have limited opportunities to engage in healthy activities and behaviors. Through the Certified Blue Zones Worksite Model, you will have a roadmap for worksite transformation to create and sustain a culture of well-being in which every employee has the opportunity to live better and work better.

¹ Bureau of Labor Statistics, American Time Use Survey: <http://www.bls.gov/tus/charts>

Worksite transformation follows the Power 9 principles to initiate permanent changes in the places where people work, eat, and network. These changes create an environment where the healthy choice is the easy choice:



Through its strategically phased approach, the Model optimizes well-being opportunity across the work community, employee social network, and physical environment, while connecting employees to their own purpose within the context of their work. Implementation of the Model begins with objective-based assessments and developments, including the following:

- **Optimize Work Community:** We evaluate the availability of healthy lunch options, volunteer opportunities, walking paths, and/or safe parks for employees to be physically active during lunch other times during the day. We recommend programs to provide a healthy work community.
- **Optimize Social Networks:** We evaluate any existing, clearly defined social engagement strategy and social network opportunities that contribute to social connections and support within the workforce. Social networks are powerful levers that can drive workforce well-being transformation. We help establish and/or expand these networks.
- **Optimize Environment:** We evaluate the framework of the worksite's culture and review if the organization's leaders (at all levels) are influencing an environment that supports well-being. For example, are the HR policies and benefits designed to encourage well-being? Do

engaging solutions exist to support employee efforts to improve and sustain well-being? Does the organization promote healthy practices and empower employees to make positive choices through the physical layout and worksite setting (healthy food options, open floor plans, promotion of stair usage, etc.)? We help you implement steps to transform the environment into one that strongly encourages engagement from the executive level down.

- **Optimize Purpose:** We evaluate the organization's efforts toward promoting a sense of purpose among employees and whether the organization supports employees in identifying and pursuing their own purpose within the context of their work. Employee purpose is often overlooked, but employees who are connected to their organizations' purpose have stronger performance, engagement, and morale. We help define an organization's purpose, and foster commitment to that purpose across your workforce.

Through this Model we support organizations to create and sustain a culture of well-being that inspires their employees to be more engaged and perform better. Our approach is rooted in proven success with pilot programs in key locations across the country, as well as the broader Blue Zones Project Community Model. We measure the impact of the initiative, and award Certification when critical criteria are met.

MODEL PHASES

The Blue Zone Project team provides direct consultative support within our transformation model to help facilitate cultural and environmental well-being transformation. The model is based on a three year total project timeline, broken into three specific phases as follows.

Discovery Phase: Three Month Duration

Blue Zone Project

- Conduct onsite assessment and focus groups: leadership, HR, facilities, employees, and Blue Zones consultants. Initiate leadership engagement and planning. Complete built environment walk through. Analyze materials and notes.
- Develop and deliver Certified Blue Zones Worksite Assessment Report and Certified Blue Zones Customized Pledge

Blue Zone Project and Client

- Conduct employer overview (includes company history, current state, handbook, metrics, current well-being program, etc.)
- Employees complete Gallup-Sharecare Well-Being 5 survey

Client

- Identify Certified Worksite Lead within company to take lead on implementation of customized pledge actions during Engagement Phase.

Engagement Phase: 15+ Month Duration

Blue Zone Project

- Complete timeline/project plan; Create marketing/communication plan
- Conduct ongoing meetings/workshops and ambassador recruitment/training

Blue Zone Project and Client

- Conduct kick-off event
- Begin completing standard requirements and customized best practices
- Conduct progress check-ins and reports and define certification metrics

- Review multi-year Well-Being 5 survey aggregate scores and metrics
- Hold best practices validation meeting and review validation document; Conduct certification review and deliver certification assessment report

Sustainability Phase: One Year Following Certification

Blue Zone Project and Client

- Conduct certification celebration event
- Develop sustainability plan
- Conduct progress check-ins and reports
- Review by Blue Zones Project team (includes plan execution, metrics/outcomes, and ongoing recommendations)

Client

- Access to Blue Zones project intellectual property via tools and resources
- Ongoing Gallup-Sharecare Well-Being 5 survey access

Achieving Certification – Key Metrics

The Certified Blue Zones Worksite Model’s goal is certification. Through the Model we provide the critical infrastructure, experts, resources, and tools to enable successful transformation; however, achieving certification requires a commitment from the entire workforce. We measure progress and support your organization toward achieving certification through validated well-being improvement initiatives for your population.

One certification metric is based on improving well-being via the aggregate Gallup-Sharecare Well-Being 5 survey scores. We deploy the Well-Being 5 survey to all employees at defined intervals, and measures the overall improvement. This provides a scientifically-validated tool to measure impact.

Certification also requires maintenance (or evidence of improvement) in at least five other key metrics attributed to the Blue Zones Project effort. The following table outlines the typical metrics utilized. Please note we are able to discuss and expand on this list as appropriate.

Value	Lower absenteeism and higher productivity	More engaged and focused employees	Reduced healthcare costs	Higher employee morale and retention
Metrics	Short term/Long term disability claims, FMLA, and sick time utilization	Program participation	Medical claims cost (includes Well-Being 5/biometric data)	Employer turnover rate
	Employee productivity	Employee engagement	Short /long term disability claims	Employee job satisfaction

Deliverables

Discovery Phase: Three Month Duration

- **Blue Zones Project Consultant:** A Blue Zones Project Consultant will provide guidance as your company implements recommended activities.
- **Pre-Work Analysis of Worksite:** Analysis of worksite documents to understand the current corporate structure around benefit design, policies, and culture. Examples of documents reviewed include your employee handbook, new employee orientation materials, and aggregate health or well-being scores.
- **Certified Blue Zones Worksite Assessment Report:** Blue Zones Project consultants will visit with a cross section of employees to gather data from key components of the employer framework. The employer's pre-work and onsite focus groups in addition to the key well-being findings from the Gallup-Sharecare Well-Being 5 survey, well-being metrics, current well-being initiatives and environment, and the leaders to drive that work will be evaluated on how closely the work environment, current practices and policies improve well-being and align with the Power 9 principles. This document will be the influencer for the Certified Blue Zones Customized Pledge.
- **Certified Blue Zones Customized Pledge:** The pledge is highly customized, outlining a strategy to improve well-being, transform the environment of your organization. It will be tailored to your company's unique environment, designed to enhance existing efforts and incorporate additional best practices. The Certified Blue Zones Customized Pledge delivers the standard and customized best practices for an organization to complete as they work to become certified.
- **Gallup-Sharecare Well-Being 5 Survey Access:** The Well-Being 5 is a comprehensive and scientifically-validated survey that measures five elements of well-being. The Blue Zones Project will provide access to the Well-Being 5 to show that the worksite has made demonstrable and measurable improvement to the well-being of their employee population to become a Certified Blue Zones Worksite.

Engagement Phase: 15+ Month Duration

- **Blue Zones Project Account Manager:** An account manager will guide and help implement recommended pledges and engagement activities. This includes developing a project plan to support ongoing pledge activity and frequent meetings to assist as needed.
- **Worksite Project Plan:** A project plan is customized to ensure mile stones are hit and timelines are met. Your Blue Zones consultant will guide the project plan and facilitate joint meetings to gauge progress.
- **Kickoff Event:** A kickoff event will serve as the official launch of the Certification Project. This 75-90 minute event will be led by a Blue Zones speaker who will explain the program for your employees and help generate enthusiasm throughout your organization. All event planning, print materials, and facilitation are included and will be managed by the Blue Zones Project team. Additional costs for promotion/giveaways are funded by client.
- **Ambassador Training:** Blue Zones Project will provide onsite training for volunteers to help encourage colleague participation and lead efforts to implement pledge recommendations.
- **Leading Well-Being Workshops:** Blue Zones Project will facilitate specialized Leading Well-Being Workshops for select leaders at your worksite. The purpose of these workshops is to develop inspirational leaders that others choose to follow. Blue Zones Project will provide Leading for Well-Being experts to deliver training that focuses on the five elements of well-being: purpose, social, financial, community, and physical. Leaders will have an in-depth look at their current and desired well-being state. Perspective is gained through a 360-degree review by colleagues, family, and friends.
- **Purpose Workshops:** One of the great secrets of happiness and longevity is living with a sense of purpose. Blue Zones Project will facilitate Purpose Workshops at your worksite that will inspire employees to bring more ingenuity and purpose to the workplace. Employees will gain a new understanding of why purpose matters, uncover their gifts, draft a purpose statement, and commit to pursue a life-long purpose journey.
- **Communications Library:** A communications library provides printable marketing communications that promote positive lifestyle changes and build excitement and awareness for the Blue Zones Project. The library includes newsletter templates and content, posters, signage, and other marketing collaterals.

- **Blue Zones Checklists:** The checklists help employees create a home inspired by the Blue Zones Power 9 principles.
- **Blue Zones Personal Pledge:** The pledge helps employees make healthier decisions by completing actions inspired by the Blue Zones Power 9 principles.
- **Moais:** A Moai (pronounced “Mo Eye”) is a group of people meeting for a common purpose, and can include activities like walking, purpose discussions, and potluck meals. Your employees will connect to small groups of supportive, like-minded people who share a passion for healthy living.
- **Certification Assessment Report:** After completion of your customized pledge and Time 2 measurements of the Well-Being 5 survey and additional key metrics, the Blue Zones Consultant will provide an assessment report of the organizations Certification journey and outcomes as well as provide a plan for sustainability.
- **Certified Blue Zones Worksite Celebration Event:** Once your company has shown well-being improvement via the Gallup-Sharecare Well-Being 5 survey, and is showing evidence of improvement in key metrics attributed to the Blue Zones Project effort, a celebration event will take place.

Sustainability Phase: One Year Following Certification

- **Tools and Resources:** Client will have access to a communications library for ongoing support as well as access to updated and future product materials including, but not limited to, playbooks, implementation materials, and core promotional campaigns.
- **Blue Zones Project Consultant:** Client will have access to a Blue Zones Project Consultant quarterly for consultation of program updates and materials.
- **Well-Being 5 Survey Access:** Your employees will have ongoing access to the Well-Being 5.
- **Blue Zones Project Events and Media:** Client will have the opportunity to attend exclusive Blue Zones Project events nationally, as appropriate, and be included in ongoing media opportunities.
- **End of Year Review:** A review will be held to gauge ongoing and new pledge activities, current culture and retaining Blue Zones Worksite Certification.