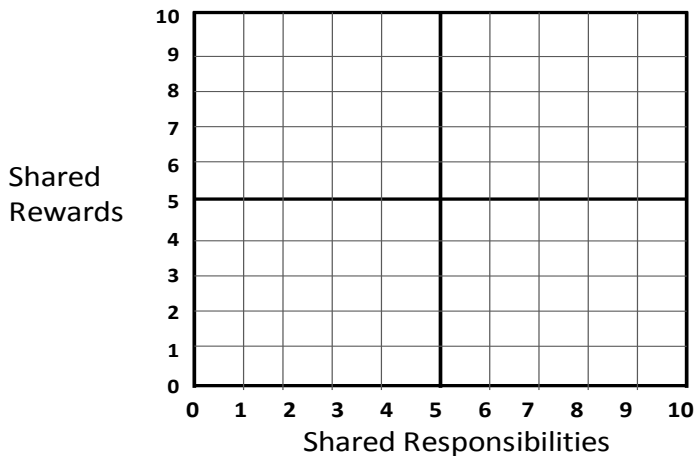


Alignment Scorecard

| Do the following conditions apply to the majority of employees in your organization? | | |
|--|--|-----|
| Shared Rewards Circle yes for any statement that is true for your organization. Then, add up the number of yes answers. | Eligible for performance-based bonuses | Yes |
| | If yes, to performance bonuses: | |
| | Employees know exactly how their bonus is determined | Yes |
| | Bonus is at least partially determined by individual performance | Yes |
| | Total amount employees can earn in bonus or profit sharing is >10% of salary | Yes |
| | Can cash-in some unused paid-time-off at 100% | Yes |
| | Offer a Health Savings Account with \$1500 or more in employer funds | Yes |
| | Match a 401K deposit at 4% or higher | Yes |
| | Cover prevention/screenings at 100% (no deductible) | Yes |
| | Offer training/tuition allowance worth at least 2% of salary (and >10% use it) | Yes |
| All workers have multiple opportunities to advance in the organization, and often do. | Yes | |
| Score (# yes) | 0 1 2 3 4 5 6 7 8 9 10 | |
| Shared Responsibilities Circle yes for any statement that is true for your organization. Then, add up the number of yes answers. | Receive a statement clearly identifying the dollar value of all investments/benefits the organization makes on their behalf. | Yes |
| | A PTO bank of time off, rather than separate sick leave | Yes |
| | Less than 100% of pay during Short-term disability | Yes |
| | A single high-deductible health plan, with the deductible at least \$1500 | Yes |
| | An out-of-pocket maximum of \$3000 or higher | Yes |
| | Fewer than 31 days of paid time off per year | Yes |
| | Strong agreement by employees and managers to the following 2 questions: | |
| | At every level, employees make independent decisions about their work | Yes |
| | Employees are encouraged to give their ideas about how the company can do better | Yes |
| | Employer sponsors financial decision-making support | Yes |
| Employer sponsors CDHP and health decision-making support | Yes | |
| Score (# yes) | 0 1 2 3 4 5 6 7 8 9 10 | |

Place an X where your two scores meet on the matrix.



Alignment Scorecard Instructions

The questions on the opposite page are part of an alignment scorecard that will be used during Dr. Wendy Lynch's presentation.

Instruction 1: This is only an exercise, simply answer as best you can.

Questions are asked about business practices in your organization. Sometimes organizations have multiple options. For example, sometimes different groups of employees have different absence policies or pay policies. If so, choose the policy that represents the majority. Or pick one subset of employee and answer for them.

Answer each question as well as you can, understanding that not all answers will be completely true for all employees. Because this is an exercise, there are no problems caused by best guesses.

Instruction 2: Read all 20 questions and circle YES for all the statements that are MOSTLY true.

If it is true for most employees, in your opinion, circle YES. Don't overthink.

Instruction 3: Count how many YES answers you circled in the top ten and bottom ten sections.

If you circled three "Yes" answers in the top ten (Shared Rewards), then circle the number 3 in the middle row showing numbers one through ten. Repeat the same for the bottom section (Shared Responsibilities), circling the number of "yes" answers you had in the bottom ten questions.

Instruction 4: Place an X where the two numbers meet on the matrix.

For example, if your two scores were 5 and 5, your X would go in the middle (as shown). If your first number was 7 and your second number was 4, the X would go where the line for number 7 on the left meets the line for number 4 at the bottom meet (shown as X₂).

