Making Well-Being Work
Ninth Annual Employer-Sponsored Health and Well-Being Survey

April 2018
Survey Methodology

- Online survey was fielded from November 2017 through January 2018 among National Business Group on Health members and clients of Fidelity Investments
- 163 companies responded to the survey
- Survey focused on:
  - Defining well-being
  - Types of health and well-being programs offered
  - Levels of incentives to engage employees and spouses/domestic partners
  - Use of outcomes and/or non-financial incentives
  - Measurement tactics and program participation results
  - Strategies for communicating well-being initiatives
  - Future of health improvement investment
  - Global well-being strategy for multinational employers
Survey Demographics
163 companies participated in this year’s survey

Respondents by Industry

Health care: 14%
Other manufacturing: 14%
Other, please specify: 13%
Technology and telecommunications: 11%
Banking or financial services: 9%
Energy and chemicals: 9%
Grocery or consumer products manufacturing: 9%
Retail: 6%
Insurance: 5%
Professional services: 3%
Government and education: 3%
Transportation and shipping: 3%
Entertainment and hospitality: 1%

Respondents by Size

Large: 38%
Mid-Market: 34%
Jumbo: 29%

Respondents by CDHP Offering

CDHP full-replacement: 18%
CDHP option: 53%
Not offered: 29%
Executive Summary

92% of companies include well-being as part of their overall business strategy with a focus on supporting employee engagement and productivity.

Employers Continue to Invest in Incentives
- Employee incentive prevalence increased from 74% to 86%
- Average annual incentive amount for employees for 2018 is $784, up from $742 last year
- 83% plan to continue or expand well-being incentives over the next 3-5 years

Employers Seek More Impactful Channels of Communication
- Personalization works – 85% of employers that personalize communications find that it increases engagement
- 61% of employers are employing social media, texting, or mobile apps to communicate with employees

Opportunities Exist to Define Global Well-Being
- 52% of multinational employers have yet to develop a global well-being strategy
- Of those with a global strategy, 77% tailor programming by country
Defining Well-Being
Well-Being is Nearly Universal Among Employers

92% of employers consider well-being part of their overall business strategy, up from 86%
Engagement and Productivity are the Main Areas of Focus

Top Objectives for Well-Being Program *Besides* Managing Health Care Cost*

- Improve engagement: 66%
- Increase productivity and reduce absence: 66%
- Improve overall business performance: 21%
- Reinforce safety messages/programs: 18%
- Assist with recruitment and retention: 16%
- Improve company reputation/brand: 11%

N = 160

*Ranked by survey respondents as first or second most important objectives among the six areas of focus*
Expanded Definition of Well-Being is the Norm

### Dimensions Included in Well-Being Strategy

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Yes (%)</th>
<th>Considering for the Future (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical health</td>
<td>98%</td>
<td>1%</td>
</tr>
<tr>
<td>Emotional/mental</td>
<td>92%</td>
<td>7%</td>
</tr>
<tr>
<td>Financial security</td>
<td>90%</td>
<td>10%</td>
</tr>
<tr>
<td>Job satisfaction / stress</td>
<td>77%</td>
<td>17%</td>
</tr>
<tr>
<td>Community involvement</td>
<td>72%</td>
<td>21%</td>
</tr>
<tr>
<td>Social connectedness</td>
<td>60%</td>
<td>25%</td>
</tr>
<tr>
<td>Purpose in life or “spiritual contentment”</td>
<td>28%</td>
<td>31%</td>
</tr>
</tbody>
</table>

N = 162, 162, 162, 158, 160, 161, 160
Program Overview
Employers Hold the Course on Condition Management Programs

**Health Risk Management**
- Health risk assessment: 83% in 2018, 73% in 2017, 9% considering for 2019
- Biometric screening: 76% in 2018, 72% in 2017, 10% considering for 2019
- On-site clinic: 38% in 2018, 35% in 2017, 10% considering for 2019

**Condition Management**
- Diabetes: 84% in 2018, 81% in 2017, 7% considering for 2019
- Coronary artery disease: 66% in 2018, 72% in 2017, 9% considering for 2019
- Asthma/COPD: 66% in 2018, 72% in 2017, 9% considering for 2019
- Congestive heart failure: 65% in 2018, 70% in 2017, 9% considering for 2019
- Other disease management programs: 64% in 2018, 55% in 2017, 9% considering for 2019
- Oncology: 58% in 2018, 52% in 2017, 9% considering for 2019

2018 Response:
- Will be in place in 2018
- Considering for 2019

2017 Response:
- Will be in place in 2017
- Considering for 2018

N = 129 - 163
Growth in Select Fitness and Healthy Eating Programs

Employers continue to add value through new benefits while keeping traditional support programs in place.

### Physical Health

<table>
<thead>
<tr>
<th>Benefit</th>
<th>2017 Response</th>
<th>2018 Response</th>
</tr>
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<tbody>
<tr>
<td>Nicotine cessation programs</td>
<td>91%</td>
<td>90%</td>
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<tr>
<td>Physical activity programs or challenges</td>
<td>86%</td>
<td>87%</td>
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<tr>
<td>Weight management programs</td>
<td>79%</td>
<td>83%</td>
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<tr>
<td>On-site fitness classes</td>
<td>66%</td>
<td>72%</td>
</tr>
<tr>
<td>Subsidies or discounts for off-site gym memberships</td>
<td>62%</td>
<td>70%</td>
</tr>
<tr>
<td>Wellness champions</td>
<td>63%</td>
<td>69%</td>
</tr>
</tbody>
</table>

### 2018 Response:
- Will be in place in 2018
- Considering for 2019

### 2017 Response:
- Will be in place in 2017
- Considering for 2018

N = 129 - 163

- Lifestyle management coaching
- Treadmill desks or sit-to-stand ergonomic support
- Nutritional labeling or promotions in the cafeteria
- Healthy food options in the cafeteria, vending machines and catering
- Subsidies or discounts for fitness wearables (e.g. Fitbit®)
- Stretch breaks
- Discounts or price differentials on healthy food options in the cafeteria
Emotional Support Programs Continue to Grow

![Bar chart showing the percentage of organizations implementing various emotional/mental health programs and their response plans for 2017 and 2018.](chart)

- Other stress management programs such as coaching or relaxation programs: 61% in place in 2018, 19% in place in 2017, 21% considering for 2019.
- Mindfulness classes or training: 52% in place in 2018, 36% in place in 2017, 23% considering for 2019.
- Resiliency training programs: 44% in place in 2018, 40% in place in 2017, 26% considering for 2019.

N = 129 - 163
Community Involvement Remains Stable

- **Collection drives**: 86% (Will be in place in 2018), 3% (Considering for 2019)
- **Team-building volunteer programs**: 75% (Will be in place in 2017), 6% (Considering for 2019), 8% (Considering for 2018)
- **Charitable match giving programs**: 69% (Will be in place in 2017), 6% (Considering for 2019), 6% (Considering for 2018)
- **Time off to volunteer**: 61% (Will be in place in 2017), 13% (Considering for 2018), 63% (Considering for 2019)

N = 129 - 163
Debt is Emerging as a Focus Area

### Financial Security

- **Financial seminars or lunch-n-learns**
  - Will be in place in 2018: 78%
  - Considering for 2019: 17%
  - Considered in 2017: 82%
  - Will be in place in 2018: 7%

- **Access to tools and resources to support emergency savings, debt management, budgeting**
  - Will be in place in 2018: 76%
  - Considering for 2019: 17%
  - Considered in 2017: 71%
  - Will be in place in 2018: 16%

- **Financial health programs or challenges (e.g., financial assessment; budget planning exercises)**
  - Will be in place in 2018: 73%
  - Considering for 2019: 20%
  - Considered in 2017: 62%
  - Will be in place in 2018: 21%

- **Access to resources to support key financial decisions like mortgages, wills and income protection**
  - Will be in place in 2018: 69%
  - Considering for 2019: 19%
  - Considered in 2017: 75%
  - Will be in place in 2018: 13%

- **One-on-one financial planning with advisor/coach**
  - Will be in place in 2018: 67%
  - Considering for 2019: 20%
  - Considered in 2017: 60%
  - Will be in place in 2018: 19%

- **Student loan counseling or repayment assistance**
  - Will be in place in 2018: 23%
  - Considering for 2019: 44%
  - Considered in 2017: 29%
  - Will be in place in 2018: 29%

*Note: N = 129 - 163*
Incentives in 2018
Financial Incentives More Prevalent for Employees; Less so for Spouses

Employee Incentive Prevalence

Spouse/DP Incentive Prevalence

Financial Incentive Amounts Rising for Employees; Dropping for Spouses

Employee
Maximum Annual Incentive Amount

<table>
<thead>
<tr>
<th>Year</th>
<th>Average</th>
<th>Median</th>
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<tbody>
<tr>
<td>2015</td>
<td>$693</td>
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<td>2016</td>
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<td>2017</td>
<td>$742</td>
<td>$350</td>
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<tr>
<td>2018</td>
<td>$784</td>
<td>$600</td>
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N = 123 (2018)

Spouse/DP
Maximum Annual Incentive Amount

<table>
<thead>
<tr>
<th>Year</th>
<th>Average</th>
<th>Median</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>$500</td>
<td>$500</td>
</tr>
<tr>
<td>2016</td>
<td>$471</td>
<td>$596</td>
</tr>
<tr>
<td>2017</td>
<td>$350</td>
<td>$500</td>
</tr>
<tr>
<td>2018</td>
<td>$600</td>
<td>$600</td>
</tr>
</tbody>
</table>

N = 77 (2018)
Employee Participation Holding at Similar Rates to Prior Years

Average Percentage of Employees Earning Incentives

- Earned Full Incentive Amount  
  - 2015: 47%  
  - 2016: 43%  
  - 2017: 43%  

- Earned Partial Incentive Amount  
  - 2015: 41%  
  - 2016: 39%  
  - 2017: 32%  

Average Percentage of Spouses/DPs Earning Incentives

- Earned Full Incentive Amount  
  - 2015: 33%  
  - 2016: 31%  
  - 2017: 30%  

- Earned Partial Incentive Amount  
  - 2015: 15%  
  - 2016: 15%  
  - 2017: 30%  
A Look at Incentive Prevalence by Program…
(of those companies with programs in place)

Health Risk Management

- Health risk assessment
  - Employees: 15%
  - Spouses/Domestic Partners: 21%
  - Total: 83%
  - N = 135/91

- Biometric screening
  - Employees: 15%
  - Spouses/Domestic Partners: 21%
  - Total: 85%
  - N = 123/74

- On-site clinic
  - Employees: 15%
  - Spouses/Domestic Partners: 21%
  - Total: 70%
  - N = 61/19

Condition Management

- Coronary artery disease
  - Employees: 38%
  - Spouses/Domestic Partners: 35%
  - Total: 35%
  - N = 103/81

- Asthma/COPD
  - Employees: 36%
  - Spouses/Domestic Partners: 33%
  - Total: 33%
  - N = 104/81

- Congestive heart failure
  - Employees: 36%
  - Spouses/Domestic Partners: 33%
  - Total: 33%
  - N = 101/80

- Diabetes
  - Employees: 35%
  - Spouses/Domestic Partners: 35%
  - Total: 35%
  - N = 135/101

- Other disease management programs
  - Employees: 34%
  - Spouses/Domestic Partners: 34%
  - Total: 34%
  - N = 104/81

- Oncology
  - Employees: 29%
  - Spouses/Domestic Partners: 31%
  - Total: 31%
  - N = 83/61

N = 135/91, 123/74, 61/19, 103/81, 104/81, 101/80, 135/101, 104/81, 83/61
A Look at Incentive Prevalence by Program…
(of those companies with programs in place)

- Physical activity programs or challenges
  - Employees: 50%
  - Spouses/Domestic Partners: 45%
  - N = 139/66

- Weight management programs
  - Employees: 50%
  - Spouses/Domestic Partners: 46%
  - N = 135/89

- Lifestyle management coaching
  - Employees: 45%
  - Spouses/Domestic Partners: 40%
  - N = 110/77

- Nicotine cessation programs
  - Employees: 42%
  - Spouses/Domestic Partners: 37%
  - N = 147/95

- Subsidies or discounts for fitness wearables
  - Employees: 37%
  - Spouses/Domestic Partners: 26%
  - N = 75/34

- Subsidies or discounts for off-site gym memberships
  - Employees: 29%
  - Spouses/Domestic Partners: 19%
  - N = 113/53

- On-site fitness classes
  - Employees: 21%
  - Spouses/Domestic Partners: 16%
  - N = 137/31

- Wellness champions
  - Employees: 13%
  - Spouses/Domestic Partners: 5%
  - N = 112/19

- Discounts or price differentials on healthy food options
  - Employees: 13%
  - Spouses/Domestic Partners: 14%
  - N = 40/7

- Stretch breaks
  - Employees: 10%
  - Spouses/Domestic Partners: 0%
  - N = 62/6

- Treadmill desks or sit-to-stand ergonomic support
  - Employees: 6%
  - Spouses/Domestic Partners: 0%
  - N = 110/7

- Nutritional labeling or promotions in the cafeteria
  - Employees: 6%
  - Spouses/Domestic Partners: 5%
  - N = 89/19

- Healthy food options at work
  - Employees: 4%
  - Spouses/Domestic Partners: 6%
  - N = 85/16
A Look at Incentive Prevalence by Program…
(of those companies with programs in place)

Emotional/Mental Health

- Resiliency training programs: 31% (N = 71/41)
- Other stress management programs: 29% (N = 98/60)
- Happiness programs: 27% (N = 48/24)
- Mindfulness classes or training: 26% (N = 84/44)
- Teletherapy: 9% (N = 66/51)

Financial Security

- Financial health programs or challenges: 21% (N = 118/56)
- Financial seminars or lunch-n-learns: 16% (N = 124/48)
- One-on-one financial planning with advisor/coach: 16% (N = 110/49)
- Access to resources to support emergency savings, debt management, budgeting: 10% (N = 124/62)
- Student loan counseling or repayment assistance: 8% (N = 37/15)
- Access to resources to support key financial decisions like mortgages, wills and income protection: 6% (N = 113/62)

Community Involvement

- Time off to volunteer: 15% (N = 97/11)
- Team-building volunteer programs: 13% (N = 119/20)
- Charitable match giving programs: 13% (N = 109/17)
- Collection drives: 6% (N = 137/45)
Outcome-Based Incentives Remain Less Common

Percentage of Employers with an Outcome-Based Incentive Model

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>44%</td>
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<tr>
<td>2016</td>
<td>24%</td>
</tr>
<tr>
<td>2017</td>
<td>31%</td>
</tr>
<tr>
<td>2018</td>
<td>24%</td>
</tr>
</tbody>
</table>

N = 163
Non-Financial Incentives Remain Prevalent

- **Prevalence of Non-Financial Incentives**
  - Employee or group recognition: 52%
  - Raffles: 47%
  - Charitable giving: 23%
  - PTO: 12%

- **Employers for Whom Non-Financial Incentives Have Improved Participation and/or Engagement**
  - Raffles: 56% (N = 75)
  - PTO: 50% (N = 20)
  - Employee or group recognition: 39% (N = 84)
  - Charitable giving: 38% (N = 37)

67% of companies offer at least one non-financial incentive

52% of companies offering non-financial incentives find at least one to be successful
Communications
New Technologies are Supplementing Traditional Communications

Frequency that Employers Use Communication Channels to Engage Employees in Well-Being Programs

- Email: 72% regularly, 25% occasionally, 3% seldom
- Employer branded well-being website / microsite: 58% regularly, 14% occasionally, 3% seldom
- HR/Total Rewards portal: 51% regularly, 20% occasionally, 10% seldom
- On-site promotions / advertising (e.g., posters, TV screens): 50% regularly, 29% occasionally, 12% seldom
- Employee meetings / wellness fairs: 32% regularly, 41% occasionally, 22% seldom
- Print or home mailers: 24% regularly, 46% occasionally, 21% seldom
- App(s): 17% regularly, 22% occasionally, 9% seldom
- Social media: 11% regularly, 17% occasionally, 11% seldom
- Website “popup” messages: 10% regularly, 11% occasionally, 12% seldom
- Text messaging: 8% regularly, 15% occasionally

61% use new platforms in addition to more traditional means of communication

N = 163
Employers Have Confidence in Their Channels of Communication

Effectiveness of Each Communication Channel at Prompting Immediate Action from Employees (Among Those That Use Them)

- Email: Very Effective 45%, Somewhat effective 53%, N = 157
- Employee meetings / wellness fairs: Very Effective 43%, Somewhat effective 51%, N = 140
- On-site promotions / advertising (e.g., posters, TV screens): Very Effective 26%, Somewhat effective 68%, N = 137
- Employer branded well-being website / microsite: Very Effective 26%, Somewhat effective 66%, N = 104
- App(s): Very Effective 26%, Somewhat effective 60%, N = 58
- Text messaging: Very Effective 25%, Somewhat effective 71%, N = 28
- Print or home mailers: Very Effective 22%, Somewhat effective 65%, N = 138
- Social media: Very Effective 19%, Somewhat effective 66%, N = 53
- Website “popup” messages: Very Effective 15%, Somewhat effective 78%, N = 40
- HR/Total Rewards portal: Very Effective 14%, Somewhat effective 70%, N = 110

N = 157

Very Effective  
Somewhat effective
Employers Use a Variety Of Methods to Measure Channel Effectiveness

Prevalence of Employers Using Each Method to Measure Effectiveness of Communications

- Anecdotal feedback: 67%
- Plan / program participation rates: 64%
- Site traffic: 49%
- Volume of calls to service center: 41%
- Surveys: 39%
- Click rates: 36%
- Focus groups: 21%

Do not measure channel effectiveness: 9%
Google Analytics reports: 8%

47% of employers actively solicit employee feedback

N = 163
Employers are Divided on the Use of Third-Party Vendors for Outreach

According to the statistics, 46% of employers use a third-party vendor for personalized well-being outreach, 31% do not use them but are considering it for 2019/2020, 19% do not use them, and 4% do not know. Out of those utilizing third-party vendors, 85% find the personalized engagement more effective. The total sample size is N = 162.
Global Strategy
Well-Being Is Addressed Country-by-Country, if at all

Prevalence of Global Well-Being Strategies Among Multinational Organizations

- 34% Yes, tailored to each market
- 10% Yes, based on U.S. strategy
- 42% No, but local markets may focus on well-being as it needs
- 10% No, no interest in well-being outside of the U.S.
- 4% Don't know

N = 100
Incentives Are Far Less Prevalent Outside the U.S.

Prevalence of Incentives/Disincentives Outside the U.S.

- **Yes** (31%)
- **No, but considering for 2019** (10%)
- **No, and not considering for 2019** (48%)
- **Don't know** (10%)

N = 99
Looking Forward
Employers Will Continue to Expand Well-Being Programs

3-5 Year Strategy for Well-being Resources or Programs

- Expand at a greater level
- Continue at the same level
- Continue at a reduced level
- No longer invest in this tactic
- Don't know

<table>
<thead>
<tr>
<th>Year</th>
<th>Expand at a greater level</th>
<th>Continue at the same level</th>
<th>Continue at a reduced level</th>
<th>No longer invest in this tactic</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>67%</td>
<td>29%</td>
<td>0%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>2017</td>
<td>55%</td>
<td>32%</td>
<td>1%</td>
<td>9%</td>
<td>0%</td>
</tr>
</tbody>
</table>

N = 161 (2018)
Employers Will Continue to Expand Incentives

3-5 Year Strategy for Well-Being Incentives

- Expand at a greater level
- Continue at the same level
- Continue at a reduced level
- No longer invest in this tactic
- Don't know

N = 160 (2018)
Key Questions for Employers

- What **role** does well-being play in your organization?
- Is the **breadth** of programs offered in alignment with your well-being goals?
- Are **incentives** aligned with desired behaviors?
- What means of **communicating** are most impactful? Are there opportunities to add greater levels of **personalization**?
- Does your organization need a **global** well-being strategy?
<table>
<thead>
<tr>
<th>ADT</th>
<th>DTE Energy</th>
<th>JetBlue</th>
<th>Quanex Building Products</th>
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<tbody>
<tr>
<td>American University</td>
<td>Dun &amp; Bradstreet</td>
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<td>AmeriGas</td>
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<td>Amgen Inc.</td>
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<td>Schwan's Shared Services, LLC</td>
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<tr>
<td>Apache Corporation</td>
<td>Duquesne University</td>
<td>L.L.Bean, Inc.</td>
<td>Seattle Children's Hospital</td>
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<tr>
<td>Aramark</td>
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<td>Baylor Scott &amp; White Health</td>
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<td>Mutual of Omaha</td>
<td>Texas Health Resources</td>
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<td>BMC Software</td>
<td>General Mills</td>
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<td>Time Warner</td>
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<td>Hanes Brands Inc.</td>
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<td>The Toro Company</td>
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<td>Harris Corporation</td>
<td>Newell Brands</td>
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<td>NextEra Energy, Inc.</td>
<td>Universal Health Services, Inc.</td>
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<td>O'Neal Industries</td>
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<td>Honeywell</td>
<td>On Assignment, Inc.</td>
<td>US Foods</td>
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<td>Huntsville Hospital</td>
<td>Pfizer</td>
<td>Utah State University</td>
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<td>IBM</td>
<td>Pinnacle Foods</td>
<td>Volvo</td>
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<td>IDEXX</td>
<td>Pitney Bowes</td>
<td>Webster Bank</td>
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<td>Portland State University</td>
<td>Wells Fargo &amp; Company</td>
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<td>Praxair, Inc.</td>
<td>Zachry Group</td>
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<td>Diageo North America</td>
<td>JE Dunn Construction</td>
<td>Qualcomm</td>
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</tr>
</tbody>
</table>