



Worksite Wellness Workbook

A step-by-step guide and resources for developing a worksite wellness program for your organization.



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Workbook Overview and Objectives

Worksite wellness programs are increasing in popularity for a variety of reasons. Health care costs are on the rise and so are chronic conditions among the working population in the United States. A worksite wellness program can not only teach employees about healthy behaviors, but also help to shift the culture of your organization to one that embraces and encourages healthy lifestyles.

According to *Wellness in the Workplace 2012: An Optum® Research Update*, Health and wellness programs are rapidly transcending their long-established status as cornerstones of the employee benefits portfolio. As human resource professionals and senior managers experience their impact on health care costs, productivity, talent retention, and recruiting success, health and wellness programs are becoming strategic differentiators for the country's most innovative and successful organizations.

Using this workbook will take you step-by-step through the assessment, planning, implementation, and evaluation phases of developing a worksite wellness program. And since no two worksites are the same, following the steps in this workbook will allow you to create a customized wellness program, designed specifically for the employees at your organization.



How to Use this Workbook

This workbook is divided into four distinct phases, each with recommended action steps to create and sustain a worksite wellness program: Assess, Plan, Implement and Evaluate. Follow the action steps and map out a strategy for an effective worksite wellness program for your company.

Assess- Identify employee health risks and interests and the organization's strengths and areas in need of improvement. Use biometric screening, health risk assessment (HRA) and other data to identify priorities for your worksite wellness program.

Plan- Define what the worksite wellness program will accomplish. Determine the specific components of your program, gain leadership support, develop a budget and form a wellness committee. You will find a budget-planning template in this section of the workbook.



Implement- Put the individual wellness program components in place. Implement communication strategies to ensure all employees know about the program and why a worksite wellness program is being offered. Keep the momentum going and maintain an effective program over time. Consider the use of incentives in your program.

Evaluate- Define how you will evaluate your program. Communicate the results. You will find general information and specific steps, tools, and resources for evaluating and communicating program outcomes to your audience.

We hope this workbook will help you learn more about worksite wellness program development and give you the tools you need to take action. Let us know what you do with this workbook — from talking about worksite wellness, to obtaining leadership and employee support, to sustaining a long-term program. Please direct your comments or questions to livewell@hap.org

Phase 1: Assess

It is important to understand your organization's culture, health risks and the wants and needs of the employees before implementing a new worksite wellness program. An organizational assessment and employee interest survey, along with biometric screening data and health risk appraisal (HRA) data will give you a picture of how to shape your wellness program.

HAP recommends that you follow these steps and use the tools available in this workbook:

Step 1: Complete an Organizational Assessment

Used to gather information about the organization overall: the employee population, leadership support, policies that support wellness and information about past wellness initiatives. Find a sample assessment on page 33 of this Workbook.

Step 2: Administer an Employee Interest Survey

Designed to determine the topics that employees are most interested in, the time of day they prefer to participate in wellness activities, their preferred method of communication, and other information to allow you to tailor the wellness program to meet their needs and interests. Find the employee interest survey on page 28 of this workbook.

Step 3: Obtain aggregate Health Risk Assessment (HRA) data

HRAs are questionnaires completed by the employee that gather information about weight, exercise and eating habits, smoking status, cholesterol levels, blood pressure and other health indicators. Employees receive a report with a snapshot of their health risks at that moment in time.

HRAs are valuable for employees and employers alike. An aggregate health risk report is generally available to the employer group (*minimum participation may be required*) from the HRA vendor. HAP has an HRA available to our members located on our website www.hap.org and provides a HIPAA-compliant, annual aggregate report of employee data when at least 100 employees complete the HRA. (A minimum participation of 100 employees is required to maintain HIPAA compliance).

Employers do not have access to individual employee HRA data at any time.

Step 4: Conduct an on-site Biometric Screening

Biometric screenings can be held at your worksite and can screen for blood pressure, body mass index (BMI), cholesterol and glucose levels. Screenings can help identify prevalent health risks within your population.

Employers do not have access to individual employee screening data. Aggregate reports may be available from the screening vendor (minimum participation may be required).

Step 5: Complete a Wellness Dashboard

Record and track key data in one place for easy access and use. Use the dashboard template on page 40 to quickly reference key data, identify trends, and track progress over time.

Phase 2: Plan

A wellness program should have an integrated, strategic approach to address the specific needs, goals and culture of your organization. This section will focus on the steps needed to develop a plan for your worksite wellness program. Neglecting the planning phase could impact the success of your program. The plan is your contract and key to getting everyone in the organization behind you.

Step 1: Gain Leadership Support

The purpose of this step is to rally the support of senior leadership within your organization. Without leadership support, a wellness program may struggle to obtain resources and participation. Receiving the support of leadership often depends on making the case for the value and positive outcomes from a worksite wellness program.

Here are some tips to obtain leadership support:

- **Make the Case** - Describe and visualize for leadership what successful outcomes and benefits the organization could achieve if a worksite wellness program were in place.
- **Present the Facts**- Use data from the assessment phase, including biometric screening and HRA data if available. Use the dashboard in this workbook to pull all of the data together.
- **Know your Market**- Show management what wellness programs similar organizations are offering.
- **Be Clear**- State what is needed and how progress will be measured and reported.

Click on a title below to download these free resources:

- **[Creating a Corporate Health Strategy: The Kansas City Collaborative Experience](#)**
Examples from 13 employers with peer-to-peer communications campaign targeted to CEOs of organizations of all sizes on the value of worksite health promotion.
- **[Take Action! Soliciting Management Support](#)**
Talking points, presentation tips, and letter templates for gaining leadership support.
- **[WELCOA Benchmark #1: Capturing Senior-Level Support](#)**
This short monograph focuses on the notion of securing senior management support for organizational health promotion initiatives as part of WELCOA's Seven Benchmarks for a results-oriented workplace wellness program.

Step 2: Establish a Wellness Committee

The next step is to establish a wellness committee. The committee will be responsible for promoting your worksite wellness program, planning activities, recruiting team leaders, and conducting program evaluations. Although the activities of the worksite wellness committee will vary from organization to organization, creating a team of employees committed to worksite wellness is essential for a long-lasting, successful program.

Below are recommendations to help you establish a worksite wellness committee:

- Identify a committee leader. This person should demonstrate leadership skills, a good understanding of your organization's priorities as well as a vision for the wellness program.
- Determine whether leadership should appoint committee members or the committee should be made up of volunteers. If employees volunteer, make sure they have the support of their management to be on the committee.
- Make sure the wellness committee represents all of the employee population; include employees from various shifts and departments, management, non-management, union, and employees of all ethnic backgrounds to reflect the diversity of your organization.
- Depending on the size of the organization, the wellness committee should be a manageable size and include different perspectives and opinions.
- Meet regularly: monthly or bimonthly. Meetings are typically more frequent in the initial stages of program planning and decrease as the program is implemented.
- Identify a committee secretary. This person will take notes and distribute meeting minutes to team members.

Use the web-based resources below to create a worksite wellness committee.

- **WELCOA. *Absolute Advantage: Creating Cohesive Wellness Teams***
WELCOA discusses why teams are an important part of building a best-in-class wellness program.
- **Eat Smart, Move More: *Saving Dollars and Making Sense: Committee Guide***
Guidelines, templates and surveys to help you create a committee that promotes policy and environmental changes to support good health at the worksite.



Personnel Affects Participation

Companies with dedicated wellness personnel achieve higher rates of participation; on average, they have a 10% higher rate of employee participation.

Wellness in the Workplace 2012: An Optum® Research Update

Step 3: Set Goals and Objectives

Goal setting will provide the overall framework for a wellness program. The goals will define what the program is trying to accomplish broadly and the objectives describe the specific changes you hope to achieve. They should be specific and measurable.

When setting the program goal ask, “what does my organization hope to accomplish by implementing a worksite wellness program?” We recommend using the SMART goals framework to identify two or three goals and the associated objectives for the program.

SMART goals are:

- ✓ **Specific** - A specific goal has a much greater chance of being accomplished than a general goal. For example, a general goal would be, "Reduce absenteeism", a specific goal is, "Reduce the number of employee sick days by 20% by January 1, 2015."
- ✓ **Measurable** - Establish concrete criteria for measuring progress toward each goal. To determine if a goal is measurable, ask questions such as; How much? How many? How will I know when it is accomplished?
- ✓ **Attainable** - When you identify goals that are important to the organization and the participants, you begin to figure out ways you can make them come true. Any goal can be achieved when a plan is developed and a timeframe is established that allows those steps to be carried out. Goals that may have seemed far away and out of reach eventually move closer and become attainable, not because the goals shrink but because of the steps taken to make them happen.
- ✓ **Realistic** -The goal must be something that the organization and the team are both *willing* and *able* to strive for.
- ✓ **Timely** - A goal should be grounded within a specific timeframe so there is both a sense of urgency and a defined end-point to achieve the goal.

Use the table below to record 2-3 goals and objectives for your organization’s program. Refer to the case study below to help you develop your goals and objectives.

GOAL	OBJECTIVE

**CASE STUDY – Setting Program Goals and Objectives:
Neighborhood Social Service Agency**

Based on the data gathered from the organizational assessment and employee interest survey, the key health concerns and interests of employees at Neighborhood Social Service Agency were smoking cessation, weight management and healthy eating. The employee population is over 40 years old, with a sedentary lifestyle and a high percentage of overweight/obesity. Based on this data, the employees at this organization were at high risk for chronic illness such as diabetes and heart disease. The wellness committee worked on defining goals to impact the identified wellness needs and interests while ultimately addressing management goals to decrease health care costs, reduce sick time, improve productivity and enhance employee morale.

The following is an example of the goals and objectives selected by the wellness committee at Neighborhood Social Service Agency.

GOAL	OBJECTIVES	TARGET DATE
Promote a tobacco-free employee population	<ul style="list-style-type: none">• To reduce the number of employees that use tobacco products from 20% to 10% by January 2015.• To implement three strategies to reduce tobacco use.	<ul style="list-style-type: none">• January 2015
Support employee weight management goals in the worksite setting	<ul style="list-style-type: none">• Increase the number of overweight employees who participate in regular physical activity by 25%.	<ul style="list-style-type: none">• January 2015
Use policy and environmental approaches to support healthy eating.	<ul style="list-style-type: none">• Implement a healthy vending machine policy.	<ul style="list-style-type: none">• January 2015

Step 4: Develop a Budget

Create a budget that will allow you to project the cost of your worksite wellness program; this step is critical to the success and sustainability of your program. Depending on the size of the program, you may have full budget responsibility or you may need to work with someone who has budgeting expertise.

As the program's coordinator, you will likely be faced with one of two distinct budget approaches, *Top down* or *Bottom Up*. These two approaches share similar qualities and will require that you provide justification for the initiatives and resources proposed.

Below is a brief description of the two budget approaches and things to consider:

Budget Approach	Description	What to Consider?
Top Down	Finite dollar amount provided by leadership with a defined limit.	Which programs are most important? How will you fund new initiatives?
Bottom Up	Coordinator is expected to submit itemized budget to leadership for approval.	How much is too much? Rank initiatives by priority (health-risk assessments should be at or near the top). Indicate which expenses are fixed and which are variable.

How to budget and what to include?

When budgeting for a comprehensive worksite wellness program, The Wellness Councils of America recommends that at least \$100-\$150 per employee per year should be spent on promotion wellness and an additional \$300 per employee annually if incentives and coaching are desired.

Also, when developing your budget, make sure to consider costs that will be fixed for the year and those that may vary. Remember that all program budgets will differ and are dependent on various factors. We suggest including costs for the following:

- Will the program be run in-house or by an outside vendor?
- Type of incentives/rewards provided
- Marketing or promotional materials (posters, flyers, brochures, etc.)
- Type of biometric screenings offered
- Health improvement programs (often provided by an external vendor)
- Web-based resources offered (Health risk assessment, online learning, etc.)
- Staff time

Use the web-based resources below to create a worksite wellness budget.

- [WELCOA. Absolute Advantage: Building Your Wellness Budget](#)

Low-Cost Worksite Wellness Ideas

Although a worksite wellness program is primarily funded by the employer, its budget does not have to be completely carried by your organization. There are ways of reducing the financial responsibilities by identifying all available low-cost or free resources, such as HAP workshops, webinars and behavior change programs.

Also, locate resources from national health organizations like the American Heart Association and state/federal government organizations like the Centers for Disease Control and Prevention for additional supportive resources. Often times, employees are willing to share expenses on program offerings like, on-site massage or exercise classes.

Consider the following ideas in order to stay on budget and keep costs to a minimum:

- ✓ Piggyback on other activities. For example, if you are planning to start a weight management workshop and a walking club, consider introducing them together to reduce internal marketing costs.
- ✓ Only include activities that aim to achieve the program objectives (no need to “waste” money on programs that will not help you meet your goals).
- ✓ Post motivational signs at elevators & escalators to encourage stair use.
- ✓ Use existing challenges/programs to encourage physical activity.
- ✓ Offer flexible work hours to allow for physical activity during the day.
- ✓ Support physical activity breaks during the workday, such as stretching or walking.
- ✓ Map out on-site trails or nearby walking routes.
- ✓ Promote walk-and-talk meetings whenever possible.
- ✓ Use the National Health Observance Calendar to promote monthly health messaging.
- ✓ Establish a worksite wellness lending library where employees can borrow exercise videos, books and magazines and obtain other health and wellness materials.
- ✓ Contact a local gym to discuss corporate discounts for club memberships.

Remember, a successful worksite wellness program consists of more than just running a series of activities or interventions. Wellness programming can require a significant portion of a staff person’s time, energy and resources. Be sure to include staff time when creating your budget.

Use the sample program budget on page 9 to assist you in developing a budget for your program.

Sample Program Budget

This is a sample budget for a company of 300 employees. A blank template is available at www.hap.org and can be used to estimate total programs costs. This information will be important when seeking leadership support for your wellness program.

Project/Category	Item	Unit cost	Quantity	Total
Assessment				
Biometric screening	Screening vendor	\$25/per person	100	\$2,500
	Promotional materials for screening event			\$250
	Incentive for participation in screening	\$3/person	100	\$300
Health Risk Assessment	Incentive for participation in HRA	\$50/person	100	\$5,000
Planning				
Wellness Committee	Meetings: materials, food, other	\$100/meeting	5/year	\$500
Wellness Programs	Lunch and Learn sessions	\$400	6/year	\$1,200
	Incentive for participation in Lunch and Learns	\$2/person	120	\$240
	Walking challenge – online program access	\$3,000		\$3000
	Pedometers	\$8	50	\$400
Implementation				
Communications	Posters, flyers, signs, etc.			\$2,000
Evaluation				
Other				
Staff time	HR Coordinator time	\$20/hour	560 hours/year	\$11,200
Total				

Note: All unit costs are fictional; please consult with your service provider for accurate price information.

Step 5: Determine Specific Wellness Interventions & Program Components



Combine interventions for an effective way to target multiple health concerns.

For example, to target obesity and high blood pressure:

- *Encourage employees to use the stairs*
- *Offer a weight management program*
- *Make healthy choices available in vending machines*

In the Assess Phase, you gathered information about your organization and identified the primary health issues and concerns of your population. If your organization is similar to others, the common health issues are weight management, nutrition, physical activity, blood pressure, tobacco use and stress management. Now it's time to identify specific programs and interventions to address those issues and concerns.

Individual and Group-based Interventions

These interventions support behavior change through activities like onsite and online educational workshops and multi-session programs that focus on awareness and individual behavior change. Examples of interventions available from HAP include:

- Wellness workshops: Healthy cooking demonstration
- Behavior change programs: Weight Wise at Work
- Self-directed resources: Healthy online recipes

Policy Interventions

Policy interventions require your organization to change or create rules and policies that encourage and support healthy behaviors. Examples of policy interventions include:

- Healthy food policy for meetings
- Tobacco free worksite policy

Environmental Interventions

Environmental interventions change the environment of your worksite to support healthy behaviors and lifestyles. Examples of environmental interventions include:

- Clean and safe stairwells
- Healthy food options in vending machines

The next few pages highlight specific program components that HAP can bring to your worksite and wellness tools you can take advantage of at any time.

HAP Wellness Workshops

Conducted by credentialed health professionals, workshops are an easy way to support employees with information and resources on a variety of health related topics. Workshops are offered onsite to all employees regardless of their health care coverage.

<input type="checkbox"/>	Allergy and Asthma Employees will learn about various types of allergies and the difference between allergies and asthma, anaphylaxis, and allergy treatments.
<input type="checkbox"/>	Back Care A physical or occupational therapist will discuss preventing, managing and treating back pain.
<input type="checkbox"/>	Diabetes Employees will learn about diabetes: prevention, types and the roles of diet and exercise in managing diabetes.
<input type="checkbox"/>	Financial Fitness Tips and techniques for living within a realistic budget, taking control of cash flow and managing money to live debt free.
<input type="checkbox"/>	Healthy Cooking Demonstration Cooking demonstration and tips from a certified chef. Sample recipes and a discussion of the use of alternate ingredients for flavorful, healthy dishes.
<input type="checkbox"/>	Healthy Eating Real-life questions and issues related to nutrition and healthy eating. Topics include reading and understanding nutrition labels, sources of protein and portion control.
<input type="checkbox"/>	Heart Health All about how the heart works, heart disease prevention and staying heart healthy with exercise.
<input type="checkbox"/>	Men's Health Health issues specific to men, including heart, prostate, and sexual health and more.
<input type="checkbox"/>	Physical Activity Strategies to increase physical activity with tips for proper stretching and moving pain free.
<input type="checkbox"/>	Smoking Cessation Employees will learn about the quitting process, programs available to help them quit, nicotine replacement therapy, and tobacco cessation medications.
<input type="checkbox"/>	Stress Management Employee will learn to change patterns of thinking to help minimize stress.
<input type="checkbox"/>	Women's Health Health issues specific to women including cancers, musculoskeletal health, menopause and more.

For more information about these wellness workshops, visit www.hap.org/worksites.

HAP Behavior Change Programs

HAP's comprehensive behavior change programs are multi-week wellness programs that encourage employees to gain a deeper knowledge about specific health topics and change their health behaviors for the long term. We supply the expert facilitator and class materials.

<input type="checkbox"/>	<i>Cooking Well</i> Gain knowledge about nutrition and learn healthy cooking techniques with this chef-led, hands-on cooking course. Fees apply.
<input type="checkbox"/>	<i>Financial Fitness: Increasing Your Cash Flow</i> Reduce financial stress and learn about managing personal finances. Attendees receive the workbooks, <i>Increasing Your Cash Flow: A Practical Financial Guide</i> and <i>31 Day Action Guide for Increasing Your Cash Flow</i> .
<input type="checkbox"/>	<i>Freedom From Smoking</i> Help tobacco users break the habit for life. Participants will develop a quit plan, learn about nicotine replacement therapies, how to avoid weight gain and how to stay smoke free.
<input type="checkbox"/>	<i>Men's Health Series</i> Engage men to take a more active role in maintaining their health with information about risk factors, personal habits and sexual health.
<input type="checkbox"/>	<i>Revive: Simple Tools to Overcome Stress</i> Reduce stress and enhance health with proven ways to feel less overwhelmed and more in control.
<input type="checkbox"/>	<i>Take Charge of Your Health</i> Self-care practices, effective doctor communication, appropriate use of urgent care centers and emergency rooms, safe medications management. Includes a 300+ page self-care manual: <i>The Healthwise Handbook</i> .
<input type="checkbox"/>	<i>Understanding Blood Pressure</i> How to manage blood pressure with diet, medication, and physical activity.
<input type="checkbox"/>	<i>Walk for Better Health™</i> A self-paced walking program designed to increase physical activity.
<input type="checkbox"/>	<i>Weight Wise at Work</i> Learn ways to adopt a healthier lifestyle with eight simple "D-I-E-T F-R-E-E" healthy habits.
<input type="checkbox"/>	<i>Women's Health Series</i> Educates employees about health concerns unique to women, like reproductive health, menopause, cancers and more.

For more information about these programs listed visit www.hap.org/worksites.

Self-Directed Resources

These resources are available 24-hours a day for direct access by employees and dependents. Encourage your employees to use and share these resources with their friends and families, allowing the message of health to spread beyond your company walls.

<input type="checkbox"/>	<u>Getting Started</u> with Physical Activity (CDC video) Video gallery with tips for meeting physical activity guidelines and muscle strengthening exercises. <i>Windows Media required, see the bottom of the page.</i>
<input type="checkbox"/>	<u>HAP's Cook eKitchen™</u> How- to cook videos with easy, healthy recipes to promote eating healthy for kids and families.
<input type="checkbox"/>	<u>Everyday Ways to Lose Weight (Henry Ford Health System)</u> Tips to achieve and maintain a healthy weight and improve your overall fitness level.
<input type="checkbox"/>	<u>Farmer's Market Directory</u> Guide for finding local farmers markets, seasonal produce and community events.
<input type="checkbox"/>	<u>Healthy Recipes from HAP</u> Collection of healthy and easy to prepare recipes from HAP's professional chefs.
<input type="checkbox"/>	<u>Henry Ford LiveWell. Exercise Ideas and Tips</u> How-to video and tips for getting moving as a way to prevent disease.
<input type="checkbox"/>	<u>Henry Ford LiveWell. Nutritional Guidelines</u> How-to video with easy to follow tips for knowing what is best to eat when you have limited time for meal planning, shopping and cooking.
<input type="checkbox"/>	<u>Physical Activity for Everyone: Overcoming Barriers to Physical Activity (CDC)</u> Tips and suggestions for understanding common barriers to physical activity and strategies to overcome them and make physical activity part of your daily life.
<input type="checkbox"/>	<u>Webinars on Demand from HAP</u> Pre-recorded audio webinars covering topics from arthritis to holiday survival.
<input type="checkbox"/>	<u>Motivational Minutes, video health tips</u> Two-minute motivational health tips from dietitian and motivational speaker Zonya Foco, R.D.

Environmental & Policy Interventions

Supportive policies and environments make it easier for employees to make healthy lifestyle choices.

Policy interventions can be voluntary or legally binding and include things like:

- Formal, written rules and policies, like making all areas of the workplace tobacco-free.
- Informal practices, such as "casual Fridays," where a rule does not exist formally, but it is collectively known that employees may wear jeans to work on Fridays
- A policy that requires healthy options for meetings where food is served, including a clear definition for what should be offered and caterers who will comply with the policy.



People, like chameleons will change to reflect their environments.

If you want healthy people, simply create healthy environments.

Thomas Golaszewski,

Environmental interventions refer to the physical workplace surroundings that help support healthy behaviors and can include:

- Providing refrigeration and food warming equipment, like refrigerators and microwaves.
- Clean and safe stairwells
- A marked walking path inside or outside the building
- Bike racks for employees who choose to bike to work

Click on a link below to download these free resources:

- [Provide a safe walking environment on facility grounds.](#)
- [Provide clean, safe, and appealing stairwells and promote their use.](#)
- [Offer and identify healthy food choices in vending machines, and cafeterias.](#)
- [Offer healthy food alternatives at meetings, company functions.](#)
- [Provide programs and policies that promote breastfeeding.](#)
- [Make all areas of the workplace tobacco-free \(indoor and out\).](#)
- [Costs and Benefits of Smoking and Smoke-Free Policies in the Workplace.](#)

Step 6: Create an Implementation Timeline

We recommend creating a timeline of all the components that will make up the program. As you create the timeline, be mindful of staff time and the overall time that your organization is able to commit to the program. Set dates for each component that are realistic and stick to those dates as closely as possible.

A timeline will not only keep events spaced throughout the year, but it will also give you a snapshot of the worksite wellness program that will be useful in the evaluation phase. Use the sample timeline below as a guide. A template is available for download at

www.hap.org/employers/worksite/planning.php

SITE: XYZ Company				
MONTH	TOPIC	EVENT TYPE (Screening, workshops, behavior change program)	RESOURCES	DATE
January	Program Planning	Planning mtg. w/HAP Promote HRA and HAP's online tools	<ul style="list-style-type: none"> Create annual schedule; use planning tools at www.hap.org/worksite Promote iStrive. Share link to "Navigating the HAP Website" webinar 	January 15, 2014
February	Heart Health	Blood Pressure Screening Heart Health Workshop	<ul style="list-style-type: none"> Promote screening Promote "Know Your Numbers" webinar. Print and distribute: <i>Heart Health</i> flyer Distribute <i>Blood Pressure & Cholesterol</i> Trifold 	
March	Healthy Eating:	Healthy Cooking Demo	<ul style="list-style-type: none"> Promote recipes and video cooking demos Print and distribute: National Nutrition Month flyer Distribute the Healthy Dining Guide. 	

MONTH	TOPIC	EVENT TYPE (Screening, workshops, behavior change program)	RESOURCES	DATE
May	Employee Health and Fitness Month	Onsite or Web-based Kick-off Walk for Better Health program (12-weeks) Or Exercise Demonstration	<ul style="list-style-type: none"> Participants receive a guide book with tracking log and a pedometer Use HAP's <i>Weekly Wellness Tips</i> as e-mail blasts or printable messages for your elevators or stairwells. 	
June	Men's Health	Men's Health Workshop	<ul style="list-style-type: none"> Print and distribute Men's Health Flyer at: Use HAP's <i>Weekly Wellness Tips</i> as e-mail blasts or printable messages for your elevators or stairwells. Distribute HAP's <i>Men's Guide to Tests and Screenings</i>. 	
July	Farmers' Market	Farmer's Market	<ul style="list-style-type: none"> Print and distribute: "Farmers Market How To Guide" Use HAP's <i>Weekly Wellness Tips</i> as e-mail blasts or printable messages for your elevators or stairwells 	
August	Financial Wellness	Financial Fitness Schedule on-site flu clinic	<ul style="list-style-type: none"> Participants receive a workbook and log book in the 6-week session. Print and distribute HAP's <i>Flu Prevention</i> flyer. 	
September	Healthy Eating	Weight Wise program Evaluate vending machines	<ul style="list-style-type: none"> Participants receive a workbook, habit tracker and cookbook with completion of 5 out of 6 classes. Participants receive 8 weeks of tips via e-mail. 	
October	Women's Health	Women's Health Workshop Women's Health	<ul style="list-style-type: none"> Print and distribute <i>Breast Cancer Awareness</i> flyer Distribute <i>Women's Health</i> and <i>Breast Cancer</i> trifold 	
November	Great American Smoke out	Wellness by the Month flyer – Smoking Cessation	<ul style="list-style-type: none"> Distribute "How to Quit Smoking" trifold. 	
December	Holiday Survival Plan for next year	On-demand webinar Schedule mtg. w/HAP	<ul style="list-style-type: none"> Promote viewing of <i>Holiday Survival</i> webinar. 	

Phase 3: Implement

Once you have completed the assessments, set program goals and choose the interventions that will make up your worksite wellness program. Remember to start simple and leave room for the program to grow. The next few steps will assist with implementing your program.

Step 1: Communicate your program

Effective communication and program branding is vital to the success of a worksite wellness program. Consistent and frequent communication, not only about the program, but also about overall health and wellness, is key to creating a culture of health in your organization. Consider the following as you plan your communication strategy:

- Explain why a worksite wellness program is being implemented. Make the messages clear and be sure to let employees know this program is for their benefit and is not a punishment for unhealthy behavior.
- Use the wellness committee to communicate and promote wellness ideas throughout the organization.
- Try a variety of methods of communication, such as posters, email, paycheck inserts, the company intranet, etc. (*Use the Employee Interest Survey to find out the preferred communication methods for your employees*).
- Strategically place informational flyers, promotional posters and other written or graphic material in areas where employees will see it, like stairwells, bathroom stalls, bulletin boards next to microwaves or time clocks, on tables in the lunchroom and break areas, etc.
- Host a program kickoff event as a way to introduce the program and create excitement about the program.
- Make sure materials and messages are culturally competent and account for special issues (e.g. traditional diets, language) of select population groups (e.g. ethnic and racial) as well as differing educational levels and physical abilities.

Part of your communication plan should also include “branding” or program naming and logo development, we will cover that in step two of this section.

Step 2: Brand your program

Creating a meaningful and recognizable look and feel for your program will help employees identify and support the program and its goals, the same way your company's name and brand provide visibility for your business.

Engaging employees in the program branding process can be a fun way to increase engagement in your program. Here are some ways to involve employees in the process:

- Have a program-branding and logo design contest. Make sure to describe guidelines and establish a deadline.
- Use images that reflect your industry, vision or employee population.
- Have your worksite wellness committee review the ideas and select a program logo and name from those submitted.
- Announce the winner, program name and logo design. Communicate to employees how the name and logo were selected and why.

Remember, effective communication will lead to greater awareness of the goals of your program and boost participation.

Step 3: Motivate and Maintain Momentum

All worksite wellness programs have a goal of high employee participation. There will always be employees that attend every wellness activity, those that attend only a few and those who chose not to participate at all. Below are some helpful hints to help get employees engaged in your program.

- **Time**—Consider time of day and program length when scheduling on-site sessions. Use the information from your employee interest survey to plan the best time, location and duration for activities. Make them easy and convenient. Onsite programs offered during the workday generally have higher participation rates than those conducted offsite or during non-work hours.
- **Communication**— messages should be consistent, clear and easy to understand from senior leadership to the staff level. Use feedback from your employee interest survey to determine the best methods of communication for your employees. Sometimes the best marketing comes from leaders by participating and vocalizing their interest, appreciation and support for the program.
- **Cost**—if there is cost involved for specific offerings, consider sharing some of the costs with employees; this may help to increase participation and make the program accessible to more employees.
- **Value**— Demonstrate to employees how and why the program is valuable and what they may be able to gain by participating. Employees need to know what's in it for them – will they feel better, sleep better, have more energy? Stress the positive benefits the program can bring to them.

Many worksite wellness programs start out strong, but in time, interest and participation can fade. Use these tips to maintain the momentum for your program and keep employees engaged over time.

- ✓ Make practicing healthy behaviors at work as easy as possible. If you can, provide:
 - secure bike storage
 - lunchtime education sessions
 - healthy dining options,
 - support groups
- ✓ Formally recognize employees who meet their wellness goals with an award or special recognition in an all-employee newsletter or other communication
- ✓ Promote the availability of healthy food options within the organization.
- ✓ Visually represent program participation rates to create friendly competition between departments.
- ✓ Encourage employees to recruit co-workers to participate in programs, to keep the momentum going.

Although there is no single method that can guarantee employee participation in a worksite wellness program, these tips can help. If your organization has an innovative way to increase or maintain participation, we would love to hear about it. Send an email to livewell@hap.org and let us know what has worked for your organization.

Step 4: Consider Incentives

More and more employers are adopting financial incentives to address low participation and engagement in worksite wellness programs. Behavior change is difficult and using incentives to motivate people to adopt simple health behaviors is effective. When employees are surveyed only 25% say they will participate in a wellness program without an incentive and cash is the preferred incentive (Aon Hewitt, 2012).

What to incent, participation or outcomes?

The target of wellness incentives is changing from participation in programs to health outcomes.

Participation-based incentives:

- The employee is rewarded for completing a specific task like a health risk assessment or participating in a smoking cessation program.
- Sixty two percent of employers surveyed use participation-based incentives. (TowersWatson, 2012)

Outcomes-based incentives:

- The employee is rewarded for achieving a specific wellness target or showing improvement in biometrics such as weight, cholesterol and blood pressure measurements.
- Twenty four percent of employers surveyed use outcomes-based incentives and more than two thirds of are considering them in the next three to five years. (Aon Hewitt, 2013)

Do incentives work?

While financial incentives can boost participation in one-time events like health assessments and screenings, there is little evidence that they're effective for long-term behavior and risk factor change. Experts agree: "The use of incentives to promote employee engagement, while increasingly popular, remains poorly understood, and it is not clear how the type (e.g., cash or noncash), direction (reward versus penalty), and strength of incentives are related to employee engagement and outcomes." (RAND, 2012)

The key to a successful worksite program capable of sustaining behavior change is the creation of a culture and environment that supports health and wellness. Within this context, the role of an incentive is to activate employees to learn about health and wellness, engage in wellness program components and begin selected behavior changes.

Designing an incentive program

When designing your wellness incentive program, we suggest you consider the following:

1. The type of incentive: for example cash, premium contribution, merchandise, etc.
2. The amount or value of the incentive
3. Direction (i.e. punishment or reward) of the incentive
4. Target or requirement to achieve the incentive
5. Eligibility and exclusion criteria
6. Administrative feasibility

Below are sample incentives that can support a wellness program:

Incentive Type	Description	Advantages	Disadvantages
Merchandise or material goods	Material goods such as t-shirts, hats, gym bags.	Easy, inexpensive, and often able to be personalized.	Must fit population to be effective. Once the items are given, motivation is easily lost.
Immediate financial rewards	Cash reward or gift card.	Offers the broadest appeal of all incentives because it can be converted into goods and services of the recipient's choosing.	Considered taxable income so the size of the actual reward is reduced after taxes are taken out.
Future financial rewards	Rewards are given at the end of a program cycle or a rebate is given at the end of a period of time	Generally fewer people qualify so this structure can offer higher rewards values than an immediate cash reward that is given to everyone.	Loss of motivation due to deferred gratification.
Postponing or sharing cost	Postponing or sharing in the cost of a program or service, such as program fees or co-payments like a health club membership.	Immediate in nature, providing the impression of 'saving money'.	Usually associated with short duration behaviors, not sustaining behavior change.
Avoid future financial cost	Avoidance of a future cost, such as contribution to health plan coverage.	Has time value advantages for the employer and can fit with benefits and compensation design.	Magnitude needs to be great enough to create a desired level of motivation.
Time off	Personal time off for use as the person wishes.	Has broad appeal to employees. This is a non-taxable event.	If leave levels are already generous, this may not provide a desired level of motivation.

Working on Wellness (Chapman, Using Wellness Incentives, 2002

Legal Considerations

When designing a wellness incentive plan you must ensure it complies with state and federal laws, most notably the Americans with Disabilities Act (ADA), the Health Insurance Portability and Accountability Act (HIPAA) and the Genetic Information Nondiscrimination Act (GINA). Consult with an attorney to be sure your program complies with all current laws. Some guidelines are:

- The program must promote health or prevent disease.
- The incentive or penalty cannot exceed 20 percent of the cost of employee-only health care coverage; starting in 2014, this rate increases to 30 percent.
- The program must give eligible individuals the opportunity to qualify at least once a year.
- A reasonable alternative standard must be offered, with the opportunity to earn the reward if an individual is not able to meet the standard due to a medical condition.
- The plan must disclose program terms and conditions in all printed or online materials.

For information on incentives and legal compliance for worksite wellness programs see link below:

➤ **WELCOA. Understanding Wellness Incentives.**

Answers to questions surrounding the use of incentives and strategies for using them.



Research suggests that employers with strong institutional backing can achieve a program participation rate of 50 percent by offering employees an incentive of \$40, those with lower levels of management support need to spend \$120 to achieve similar participation rates.

CASE STUDY- A shift in approach, Trek bike's incentive program

Trek initially focused on wellness as a way to keep employees happy and healthy. Health risk assessments (HRAs) were introduced on-site in 2005 as a voluntary measure, drawing 21 percent of employees. The next year, Trek used a \$100 cash incentive to boost participation to 61 percent. However, things changed in 2007 when a 20-year employee died suddenly and the spouse of another long-term employee suffered a debilitating stroke.

"Those really bad situations made us say that we're not going to sit back and continue to give people cash or a T-shirt for doing an HRA," Pagels says. "We're going to hold people accountable for their health and lifestyle decisions."

CEO John Burke introduced a formal wellness program to all employees, not to save money, but to save lives. It would hold both the company and employees accountable for making changes required to improve their health.

The company linked payment of the employer's contribution to the 2009 health insurance premium, valued at an average of \$269 biweekly, to full participation in HRAs for the employee and spouse, biometric screening, coaching and a nutrition class.

"We became very heavy-handed and had a big stick," Pagels says. "But the reason for the stick was directly connected to the historic things that happened. Very quickly we got to 99 percent participation."

Trek now asks employees to qualify for the health premium by HRA and biometric screening participation as well as earning 1000 "wellness points" by participation in preventive exams, health screenings, health coaching or fitness activities and programs. More than 99 percent of the 780 employees enrolled in the health plan completed an HRA in 2010.

Even employees who do not participate in Trek's health benefits program are asked to complete an HRA, with 75 percent participation among all Trek's 1200 U.S. employees. Results have been impressive, with decreases in health risks, treatment costs for major disease states and absences.

A complete version of the Trek case study can be found at:

http://www.the-alliance.org/uploadedFiles/Learn_More/Case_Studies/casestudy_trek.pdf

Phase 4: Evaluate

Program evaluation is an important and often skipped step in a worksite wellness program. Conducting an evaluation of the program will help determine if you met the program goals and objectives and to assess the health impact the worksite wellness program had on your employees.

Consider evaluating the program at various points throughout its cycle. For example, you might conduct an evaluation at the end of an activity, another evaluation at the end of each quarter and another at the end of each year. Ongoing evaluation will allow for changes or adjustments in the program based on feedback and response from the employees. Evaluation at the end of a specific program assesses the impact on knowledge and behaviors of the participants in that program. Evaluating the program at the end of each quarter and year will give you an idea of changes in culture and attitudes in your organization.

Tips for capturing useful evaluation data:

- ✓ **Listen, learn and communicate**—remember that program participants, experts and leadership can give you tremendous insight into a program. Learn from what these individuals tell you and consider their feedback when making tweaks and changes to the program. Make sure the findings are shared not only with leadership and the wellness committee, but throughout your organization.
- ✓ **Prepare**— If you were not on board at the start of the wellness program, find out as much as possible about the program that you are evaluating; how long has it been in existence, who has been the administrator, what are the components of the program, has it been evaluated before? Gather as much information as possible before starting the evaluation.
- ✓ **Be Transparent**—familiarize yourself with all aspects of the evaluation you just completed. Be able to explain the scope of the evaluation, how you selected the metrics, as well as how and where you gathered information.
- ✓ **Embrace criticism**—do not be afraid of poor evaluation remarks. They are a reflection of the program, not an attack on the program administrator or committee and can help you make necessary changes that lead to a more successful experience. Let the data drive the program.

Step 1: Determine What you Will Evaluate

Suggested evaluation metrics and tools needed to measure each.

What to Evaluate	Evaluation Tool	Information Gained
Participation	Program Sign-up Sheets	Will tell you how many people participated during the program cycle.
Satisfaction	Program satisfaction surveys	Indicates how the program was perceived and received by employees. Valuable information can be gained by satisfaction data for tweaking the program in the future.
Knowledge, attitudes and behaviors.	Pre and Post program quiz	Indicates if there has been a change in knowledge, attitude and behavior based on activities, education and information provided in the program.
Changes in cholesterol levels, blood pressure, blood glucose, weight and body composition.	Biometric screening requires a six month to one year follow-up screening for comparison.	This data will demonstrate if the program is impacting specific health risk factors.
Behavioral Risk factors	HRA summary report	This data will indicate if the program has had an effect on employee health behaviors such as exercise and healthy eating.
Physical environment and organizational culture	One-year follow-up organizational assessment.	This data will indicate what organizational and policy changes have been made on the overall organization and its culture and environment.
Productivity	Human Resource data	Comparing sick time data before and after the first year of the program could indicate if the program had an impact on absenteeism.
Return on investment (ROI). <i>You may need outside assistance to complete this type of evaluation. It can include changes in health care costs, workers' compensation, disability claims, absenteeism, productivity and other measures important to your organization.</i>	Data may come from your organization's Human Resource division, and insurance carrier(s) when available.	This data should be able to give you an estimate of the cost of your worksite wellness program in comparison to the savings it yielded.

Step 2: Communicate Outcomes

A leadership team that has been supportive of a wellness program will want to hear what you have to say and be interested in the program outcomes. Follow your organization's reporting requirements when reporting outcomes for the worksite wellness program. Find out what your leadership will expect to see in the report so that you can create it to meet their expectations.

As you prepare your report, consider these questions:

- What level of detail does leadership expect to see?
- What is the organization's standard for reporting?
- Who will receive the report?
- Will there be a formal presentation or document distribution?
- Will the audience have an opportunity to ask questions?

Tailor the report based on who will receive it. High-level executives will most likely not have the time to read extensive documents. Include an executive summary highlighting key findings and major next steps.

Click on a title below to download these free resources:

- ***The Health Communication Unit: Evaluating Comprehensive Workplace Health Promotion***
Overview of process and outcome methods appropriate for evaluating comprehensive workplace health promotion.
- ***WELCOA News &Views: Worksite Wellness Evaluation***
Interview with David Chenoweth discussing the right steps, and how to focus on realistic, measurable objectives using the proper evaluation methods.
- ***Workshifts. Evaluating a Fund's Wellness Initiative***
Describes three types of evaluation for accurately assessing a wellness initiative—process, intermediate, and outcome evaluations.

Conclusion

A well-designed worksite wellness program will offer employees not only the knowledge, but also the opportunity to make healthier choices and live healthier lives.

By using this workbook as a guide, you can not only create an effective wellness program, but by revisiting the steps throughout the program revise and allow the program to evolve to meet the changing needs of your organization.

Remember the program development model:

- **Assess**
- **Plan**
- **Implement**
- **Evaluate**



In keeping with HAP's mission of **Enhancing the Health and Well-being of the Lives We Touch**, worksite wellness coordinators are available to offer assistance to organizations working to create healthier worksites. Feel free to contact us at livewell@hap.org

APPENDIX A: Sample Employee Interest Survey

We would like to learn about your interest in worksite wellness. Please take a few minutes to complete this survey. Your responses will be used in planning worksite wellness programs for our employees. All survey responses are completely anonymous.

Tell us about your interests:

1. Please rate your interest in the following health topics:

Topic	Not Interested	Only Slightly Interested	Somewhat Interested	Very Interested
Allergy and Asthma	1	2	3	4
Back Care	1	2	3	4
Blood Pressure	1	2	3	4
Cash-Flow Management (Finances)	1	2	3	4
Diabetes	1	2	3	4
Healthy Cooking	1	2	3	4
Healthy Eating	1	2	3	4
Heart Health	1	2	3	4
Medical Self-Care	1	2	3	4
Men's Health	1	2	3	4
Physical Activity	1	2	3	4
Sleep	1	2	3	4
Smoking Cessation	1	2	3	4
Stress Management	1	2	3	4
Understanding Health Insurance	1	2	3	4
Walking Program	1	2	3	4
Weight Management	1	2	3	4
Women's Health	1	2	3	4
Workspace Ergonomics	1	2	3	4

2. If it was a topic of interest to you, how likely are you to participate in the following:

	Not at all Likely	Somewhat unlikely	Somewhat Likely	Very Likely
Multi-week group programs (example: weight or stress management programs)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Single session workshops (example: healthy eating or heart health one-hour class)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health screening (example: blood pressure screening)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health fair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Self-directed programs (example: activity tracking program)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online programs (example: webinar, weight management program)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Read a newsletter (email or paper copy) on wellness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group events in the community (example: Heart Walk, 5K)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I do not plan to participate in any wellness programs at work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. What time of day would be best for you to participate in a wellness activity? (Check only one answer.)

- ☐ Before work
☐ During Lunch
☐ After Work
☐ Other: _____

4. How long should a wellness activity last?

- ☐ Less than 15 minutes ☐ 45 minutes
☐ 15 minutes ☐ 60 minutes
☐ 30 minutes ☐ Other: _____

5. If a wellness activity was of interest to you, would you be willing to pay to participate?

(Example: group walk or run, weight management or exercise program, cooking program)

- ☐ Yes
☐ No

6. If you answered yes to the above question, please indicate how much you would be willing to spend: (If you answered no, skip to the next question.)
- ☐ Up to \$10 per year
 - ☐ Up to \$25 per year
 - ☐ Up to \$50 per year
 - ☐ Up to \$100 per year
 - ☐ Over \$100 per year
 - ☐ Other: _____
7. Which of the following incentives would increase your likelihood to participate in wellness activities? (Check all that apply.)
- ☐ I would participate without an incentive.
 - ☐ Financial rewards (cash, gift cards, lower cost in health insurance)
 - ☐ Days/hours off
 - ☐ Free food at the program
 - ☐ Small gifts
 - ☐ Raffles for gifts or financial rewards
 - ☐ I would not participate even with an incentive.
 - ☐ Other: _____
8. How would you prefer to receive information about the company's worksite wellness events? (Check up to two answers.)
- ☐ Written materials (newsletters, flyers, memos)
 - ☐ E-mail
 - ☐ Department meetings
 - ☐ Online
 - ☐ Other: _____
9. Would you support any of the following: (Check all that apply.)
- ☐ Increase healthy food and drink options in the cafeteria and vending machines
 - ☐ Decrease unhealthy food and drink options in the cafeteria and vending machines
 - ☐ Policy encouraging healthy foods for catered meetings
 - ☐ Policy encouraging walking meetings when applicable
 - ☐ Tobacco-free workplace including all outdoor areas of the property
 - ☐ Establishment of a wellness or relaxation room
 - ☐ Safe, accessible and inviting stairwells
 - ☐ Safe, accessible walking routes (indoors or outdoors)

10. Are there any barriers that prevent you from participating in wellness activities? (Check all that apply.)

- ☐ Inconvenient time or location
- ☐ Lack of time
- ☐ Privacy: my employer should not be involved in my personal health
- ☐ Confidentiality: concern about others knowing of my personal health
- ☐ Lack of management support or pressure to get my work done
- ☐ My job duties do not allow me to participate
- ☐ Just not interested
- ☐ Other: _____

Choose to use question 11, or remove question 11 and use questions 12-15 instead.

11. Please provide any recommendations on how to help employees make healthy choices at the workplace.

12. What is the best way for your worksite to help employees to be more physically active?

13. What is the best way for your worksite to help employees eat healthier?

14. What is the best way for your worksite to help employees reduce their stress levels?

15. What is the best way for your worksite to help employees quit smoking?

16. Please rate how helpful our current wellness programs have been in helping you reach your wellness goals? (Optional question the group can remove if not applicable.)

- ☐ Extremely helpful
- ☐ Somewhat helpful
- ☐ Only slightly helpful
- ☐ Not at all
- ☐ I have not participated in current programs

Comments:

Tell us about yourself:

Gender:

- ☐ Male ☐ Female

Age group:

- ☐ Under 21 ☐ 21-30 ☐ 31-40 ☐ 41-50 ☐ 51-60 ☐ 60+

Current job category: (Optional question the group can remove if not applicable.)

- ☐ Hourly ☐ Salary

What shift do you work? (Optional question the group can remove if not applicable.)

- ☐ 1st Shift (day) ☐ 2nd Shift (evening) ☐ 3rd Shift (overnight)
☐ Rotating ☐ Other: _____

How do you access the Internet: (Check all that apply) (Optional question the group can remove if not applicable.)

- ☐ Work computer
☐ Home computer
☐ Mobile phone
☐ I do not access the Internet
☐ Other: _____

In which of the following categories would you place yourself? (Check only one.)

- ☐ I'm not interested in pursuing a healthy lifestyle.
☐ I have been thinking about changing some of my health behaviors.
☐ I am planning on making a health behavior change within the next 30 days.
☐ I have made some health behavior changes but I still have trouble following through.
☐ I have had a healthy lifestyle for years.

Are you interested in participating on the company wellness committee?

(Optional question the group can remove if not applicable.)

- ☐ Yes
☐ No

APPENDIX B: Sample Organizational Assessment

Completing the *HAP Organizational Assessment*

Obtain management permission for conducting the assessment and enlist the help of others at your worksite in completing the assessment. The entire assessment will take approximately 30 minutes to complete. Before you begin:

- Read the entire document before starting the assessment.
- Take a walk through your worksite and speak with employees from various departments and levels.
- Make notes about the environment to see whether it supports or prohibits healthy behaviors.
- Answer each question to the best of your knowledge. Make sure that all team members agree on the answers.
- Enter all responses in the gray shaded areas. Please be sure to save a copy for your records. Upon completion, please forward a copy of your assessment to the HAP worksite wellness team at livewell@hap.org

Complete Section 1 below in order to capture demographic information that identifies your worksite's population. If you choose to skip this section, please proceed to Section 2 of the assessment.

1. Contact Information

Company Name: _____

Address: _____

City/State: _____

Zip Code: _____

Contact Name: _____

Title: _____

Email address: _____

Phone: _____

2. Employee Characteristics

2a. Number of Employees: ☐ <100 ☐ 100-249 ☐ 250-749 ☐ ≥750

2b. Number of locations: _____/_____/_____/_____

2c. Employees per location: _____/_____/_____/_____

2d. Number of shifts: _____/_____/_____/_____

2e. Number of off-site/remote employees: _____

2f. Gender:

% Female _____

% Male _____

2g. Average age: _____

2h. Racial/ethnic group:

% Non-Hispanic White _____

% Non-Hispanic Black/African American _____

% Hispanic/Latino _____

% Asian/Asian American _____

% Native Hawaiian/Pacific Islander _____

% Other _____

2i. Work status:

% Full Time _____

% Part-time _____

2j. Job type:

% Salaried _____

% Hourly _____

% Union _____

% Non-union _____

Section 3: Leadership and Support	YES	NO
1. Does your company's mission and goals support a worksite wellness program?	<input type="checkbox"/>	<input type="checkbox"/>
2. If you have union representation, does union leadership support a worksite wellness program?	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your company have support from senior leadership, human resource managers and other department managers for a worksite wellness program?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does your company provide financial support for a worksite wellness program?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does your leadership participate regularly in worksite wellness programs?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your leadership encourage employees to participate in worksite wellness programs and activities?	<input type="checkbox"/>	<input type="checkbox"/>
Section 4: Wellness Committee and Coordination	YES	NO
7. Does your company have a wellness committee? <i>If no, skip to question 12</i>	<input type="checkbox"/>	<input type="checkbox"/>
8. Is your wellness committee representative of your workforce? <i>For example, the wellness committee is made up of at least one member from each area of your worksite, such as management, clerical, union/non-union and various shifts.</i>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does the wellness committee have staff dedicated to manage the worksite wellness program? <i>For example, committed employee volunteers, paid staff member's job description, external vendor.</i>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does your worksite wellness committee meet regularly throughout the year? <i>For example, monthly, bi-monthly or quarterly?</i>	<input type="checkbox"/>	<input type="checkbox"/>

11. Has the worksite wellness committee developed a plan that addresses the purpose, duration, necessary resources, budget and expected outcomes of a worksite wellness program?	<input type="checkbox"/>	<input type="checkbox"/>
12. Does your company receive support and services for its worksite wellness program from any of the following sources? <i>Select all that apply.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Internal staff	<input type="checkbox"/>	<input type="checkbox"/>
Health plan(s)	<input type="checkbox"/>	<input type="checkbox"/>
External Wellness Vendor	<input type="checkbox"/>	<input type="checkbox"/>
Community resources <i>For example, American Cancer Society, local hospital, etc.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Section 5: Policies and Environmental Support	YES	NO
13. Does your company have a written policy or formal communication oriented toward any of the following: <i>Select all that apply.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Tobacco-free environment, including all areas of the property	<input type="checkbox"/>	<input type="checkbox"/>
Healthy food options in company vending machines	<input type="checkbox"/>	<input type="checkbox"/>
Healthy food options provided by onsite cafeterias	<input type="checkbox"/>	<input type="checkbox"/>
Healthy food options at company meetings/functions	<input type="checkbox"/>	<input type="checkbox"/>
14. Does your company have a written policy or formal communication regarding offering worksite wellness programs during company time?	<input type="checkbox"/>	<input type="checkbox"/>
15. Does your company provide supports for any of the following:	<input type="checkbox"/>	<input type="checkbox"/>
Accessible kitchen equipment for food storage and preparation <i>For example, refrigerators, microwaves, etc.</i>	<input type="checkbox"/>	<input type="checkbox"/>

Well-lit and accessible stairwells <i>For example, the policy or formal communication makes stairwells safe and accessible for employees and promotes their use as a way to support physical activity at the worksite.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Lactation rooms (or private areas) for breastfeeding use	<input type="checkbox"/>	<input type="checkbox"/>
Mental health and stress management resources <i>For example, Employee Assistance Program, Insurance carrier resources, local resources, etc.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Section 6: Communication	YES	NO
16. Does your company use any of the following methods to communicate worksite wellness information to its employees? Select all that apply.	<input type="checkbox"/>	<input type="checkbox"/>
Paycheck stuffers	<input type="checkbox"/>	<input type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>
Direct mailing	<input type="checkbox"/>	<input type="checkbox"/>
Flyers	<input type="checkbox"/>	<input type="checkbox"/>
Bulletin board	<input type="checkbox"/>	<input type="checkbox"/>
Company Intranet	<input type="checkbox"/>	<input type="checkbox"/>
17. Does your company communicate wellness program information on a regular basis? For example, employee interest survey results, program offerings, length of programs, incentive, eligibility and confidentiality.	<input type="checkbox"/>	<input type="checkbox"/>
18. Does your worksite inform new employees during orientation about worksite wellness programs or classes offered?	<input type="checkbox"/>	<input type="checkbox"/>
19. Does your company provide worksite wellness program information at open enrollment meetings? For example, open enrollment is used as an opportunity to communicate company's position regarding worksite wellness programs and offerings available to all employees.	<input type="checkbox"/>	<input type="checkbox"/>

Section 7: Wellness Offerings	YES	NO
20. In the last 12 months, has your company offered a health risk assessment?	<input type="checkbox"/>	<input type="checkbox"/>
21. In the last 12 months, has your company provided education and Resources on healthy living? For example, education and resources can include in-person or online, onsite staff, in-group or individual programs coordinated through vendors, health insurance, community groups or others.	<input type="checkbox"/>	<input type="checkbox"/>
22. In the last 12 months, has your company offered an onsite screening for any of the following: Select all that apply.	<input type="checkbox"/>	<input type="checkbox"/>
Blood pressure	<input type="checkbox"/>	<input type="checkbox"/>
Cholesterol	<input type="checkbox"/>	<input type="checkbox"/>
Blood sugar	<input type="checkbox"/>	<input type="checkbox"/>
Body Mass Index (BMI)	<input type="checkbox"/>	<input type="checkbox"/>
23. Does your company offer wellness programs to any of the following? Select all that apply.	<input type="checkbox"/>	<input type="checkbox"/>
All shifts	<input type="checkbox"/>	<input type="checkbox"/>
Spouses / domestic partners	<input type="checkbox"/>	<input type="checkbox"/>

Section 8: Incentives	YES	NO
24. Does your company have an incentive program in place in order to increase participation, engagement and compliance? <i>For example, water bottles, pedometers, gift cards, monetary rewards, health insurance discounts or health savings account contributions. Incentives will vary based on budgets and program goals and may be built into the benefit design.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Section 9: Assessment and Evaluation	YES	NO
25. Does your company offer an annual interest survey to employees as a way to plan future wellness programs?	<input type="checkbox"/>	<input type="checkbox"/>
26. Does your company use health risk assessments and health screenings as tools for planning wellness programs?	<input type="checkbox"/>	<input type="checkbox"/>
27. Does your company have an evaluation process in place to measure its worksite wellness program? <i>For example, evaluation may consist of participant counts per campaign, participant satisfaction, improvements in knowledge attitudes and behaviors.</i>	<input type="checkbox"/>	<input type="checkbox"/>

APPENDIX C: Sample Program Dashboard

Use HAP's program dashboard to house key metrics for easy access, identifying trends, and tracking progress over time. Download a copy of the dashboard at www.hap.org/worksites

Company Name:				
Employee Demographics				
Number of employees			Percent Male	
Number of locations			Percent Female	
Employees per location			Average Age	
			Percent Hourly	
Percent Salaried			Percent Full Time	
Biometric Data			Health Risk Assessment Data	
Screening Date			Total Number	
Blood Pressure	Number Screened		Average Wellness Score	
	% High BP		Top Health Risks	
Body Mass Index (BMI)	Number Screened			
	% Overweight (>25)			
Cholesterol	Number Screened		% Smoke	
	% High Cholesterol		% Overweight	
Other			% High BP	
			% Diabetes	
			% Heart Disease	

Employee Interest Survey				
Survey Date		Number completed		
Health Priority		Preferred Communication	email	
1			Written	
2			Internet	
3			Other	
Preferred Time of Day		Preferred Program length	<30 minutes	
Before work			30-45 minutes	
During lunch			45-60 minutes	
After work			Other	
Other				
Organizational Assessment				
Completion date:				
	Doing well	Neutral	Needs Improvement	NA
Leadership Support				
Facility				
Policies and procedures				
Communication				
Incentives				
Wellness programs				
Key Findings:				

APPENDIX D: Implementation Timeline Template

SITE:				
MONTH	TOPIC	EVENT TYPE (Screening, workshops, behavior change program)	RESOURCES	DATE
January				
February				
March				
MONTH	TOPIC	EVENT TYPE (Screening, workshops, behavior change program)	RESOURCES	DATE
May				
June				
July				

MONTH	TOPIC	EVENT TYPE (Screening, workshops, behavior change program)	RESOURCES	DATE
August				
September				
October				
November				
December				

APPENDIX E: Web-based resources

Program Planning

The Power of Planning a Good Plan Today is Better than a Perfect Plan Tomorrow

Article discussing four reasons why planning is an essential part of developing a results-oriented wellness program.

Leadership Support

Leading By Example. Creating a Corporate Health Strategy.

Examples from 13 employers with peer-to-peer communications campaign targeted to CEOs of organizations of all sizes on the value of worksite health promotion.

When it Comes to You: The Power of CEO Support in Advancing a Small Business Wellness Initiative

This article focuses on why CEO support is essential for implementing a wellness program in a small business setting and provides strategies for getting CEO buy-in.

Take Action! Soliciting Management Support

Taking points and tips to help you determine what you will need before you meet with leadership about the resources you will need to start and maintain your worksite wellness program.

WELCOA Benchmark #1: Capturing Senior-Level Support

This short monograph focuses on the notion of securing senior management support for organizational health promotion initiatives as part of WELCOA's Seven Benchmarks for a results-oriented workplace wellness program.

CDC's LeanWorks: Gain Support

Video and tips for presenting a strong business case and gaining support from senior management for any worksite wellness program.

Some of these publications are available for download only as *.pdf files and require Adobe Acrobat Reader for viewing.

Establishing a Worksite Wellness Committee

[CDC's LeanWorks: Forming a Committee](#)

Video and tips for establishing, maintaining and sustaining a successful worksite wellness committee.

Incentives and Compliance

[Understanding Wellness Incentives. WELCOA](#)

Interview with Larry Chapman discussing the use of incentives and strategies for using them to improve the health and wellbeing of your workforce.

Environmental and Policy Interventions

[Vending Machine Food and Beverage Standards](#)

Suggestions and ideas for implementing healthy food and beverage standards in company vending machines.

[Fruit and Snack Bowl: A Guide to Starting a Healthy Snacks program at your worksite](#)

Strategies and objectives for starting a healthy snacks program at your worksite.

[University of Minnesota School of Public Health: Guidelines for Offering Healthy Foods at Meetings, Seminars and Catered Events](#)

Recommendations and ideas for serving healthy foods at worksite events.

[HAP's Worksite Farmers' Market How-To Guide](#)

Step- by- step guide for setting up a successful farmers' market at your worksite.

Case Studies

[Workplace Wellness Programs Study: Case Study Summary Report](#)

Report investigates the characteristics of workplace wellness programs, their prevalence, their impact on employee health and medical cost, facilitators of their success, and the role of incentives in such programs.

[The Alliance: Wellness Keeps Trek Bicycle Employees Happy, Healthy and Alive.](#)

Case study highlights Trek Bicycle Corporation's wellness program journey from a one that reached about 21 percent of employees to one that engages 99 percent of employees covered by its health plan.

Physical Activity

[Move More North Carolina: A Guide To Creating Walking Maps](#)

Ideas and tips for developing and promoting walking routes for your worksite and community.

[California 5 a Day: A Guide to Establishing Worksite Walking Clubs](#)

Guide designed to create a successful walking club at your worksite.

[American Cancer Society: Meeting Well™](#)

Planning tool to help companies organize meetings and events with good health in mind.

[American Heart Association: Start Walking Now](#)

Tools for developing a walking program, tracking activity levels and creating individual walking plans.

[Network for a Healthy California: Improving Worksite Stairwells](#)

Suggestions to help your employees enjoy the benefits of physical activity, simply by taking the stairs on a regular basis.

Tobacco Free Workplace

[American Cancer Society Workplace Solutions: Tobacco Policy Planner](#)

Online assessment tool to determine where your company falls along the workplace tobacco free policy continuum. Report provided with resources specific to your company's needs.

Breastfeeding and Lactation Support

[Business Case for Breastfeeding](#)

Support kit provides template tools to personalize the unique needs of your company. Use them to implement your lactation support program.

Appendix F: Frequently Cited Concerns

We do not have a budget for a worksite wellness program.

That is ok. Not all worksite wellness programs operate with a generous budget. That is why HAP provides support with programs, screenings and other resources. The only costs that your organization will have to cover are your staff's time for planning and implementation of your program and incentives to keep your employees motivated.

Our internal staff is very busy and do not have time to develop a worksite wellness program.

We realize that your staff has a lot on its plate, and it can be hard to juggle an additional responsibility, but employee health has to become a top priority. An unhealthy workforce is an unproductive and costly workforce, but with small changes to improve employee health; you will start to see big differences in employees.

The greatest amount of time and commitment is placed on the program coordinator who will be responsible for the developing and implementing the program. However, with strong leadership support, the time commitment can be distributed across staff so that the program's administration is shared with the worksite wellness committee and its members.

My employees don't really care about healthy eating or physical activity.

In truth, they probably do, but just don't know where to start. Weight management, nutrition and physical activity can seem very overwhelming to many people, but HAP's worksite wellness program offerings are developed to provide a simple approach to better health and will help your employees make simple lifestyle changes that will have a positive impact on their lifestyle.

We want to engage our bargaining groups in our wellness programs.

It is important to establish an early working relationship with key bargaining groups when developing a worksite wellness program. Seek management approval to work closely with union officials before proceeding and make sure you involve union staff by inviting them to be part of your committee. Union employees and union leadership may have a different focus and expectations and they should be known in order to develop and implement appropriate programming.