

Developing a Worksite Employee Wellness Plan

Introduction

Everyday, Texans face the risks of developing chronic diseases. No employee is immune to these risks. The risk of heart disease, high blood pressure, osteoporosis, diabetes, overweight and some cancers can all be reduced by incorporating healthy behaviors such as physical activity, good nutrition, and stress reduction into our daily lives. Employers are recognizing that it is good business to help their employees in making healthier lifestyle choices. By providing a supportive environment that offers access to health education programs, value-based benefits, safe and health-friendly facilities and sound policies employers can improve the health and productivity of their employees and also create a healthier business outcome.

This template can serve as a basic start for developing an employee wellness plan. It provides an outline to comprehensively assess, plan and implement programs, policies and supportive changes within the work setting.

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Worksite Employee Wellness Plan

Developing an employee wellness plan can be an exciting opportunity to learn more about the needs and priorities of the employees. By offering employees a chance to enhance their ability to improve their quality and quantity of life, employers can become collaborators with the people who spend most of their daily time at the worksite.

Outline of the Program Plan Activities and Evaluation

Section 1 – General Information

Program Overview

A brief overview of the organization's program should describe the overall purpose and goal. This will inform persons on what the organization is attempting to accomplish by implementing the program.

Example: The (name of organization) employee wellness program is a voluntary program of structured activities for its administrators and employees designed to result in an increase in the general level of their health fitness.

Participation Requirements

The organization's policies and procedures such as personnel policies should be considered and explicitly stated in the program plan.

Example of items to consider are:

Eligibility requirements.

(1) Describe the eligibility for voluntary or mandatory participation by administrators and employees (full-time and part-time) in program activities.

(2) Describe the eligibility of spouses and other immediate family members of administrators and employees to participate in selected program activities, as determined by an organization's chief executive officer or his/her designate.

Employee Assessment

Evidence that employees' needs and interests have been considered in planning program objectives should be included to help determine what programs to offer. Employees' needs and interests should be assessed to assist planners in identifying what, when and how employees will access health programs. Other assessments can provide insight into persons' lifestyle habits and health claims, providing the ability to target programs to the employees with the most pressing

needs. A description of the information learned will provide justification to management on the implementation of specific activities.

Example: Survey tools, focus groups, health risk appraisals, health claims data review

Use of Facilities

A description on the use of available facilities for health fitness or educational programs should be included to provide guidance on what is allowable at the worksite.

Examples: Use of such facilities might include conference or meeting rooms, auditoriums, showers, lockers, and outdoor areas suitable for instruction or fitness activities.

Providers of Instruction/Services.

An organization may consider contracting with qualified providers of instruction and services related to their program. Qualified personnel within an organization may also be available to serve as health fitness instructors and activity leaders, when appropriate. If internal employees are allowed to provide services, the organization should state any limitations regarding the use of work time to provide those services.

Examples: local, state, or federal agencies; hospital, medical care professionals; health educators; nutritionists; dietitians; exercise physiologists; community organizations; consultants; or other individuals or group with expertise in the health fitness area.

Section 2 - Program Content.

Many organizations' employee wellness efforts will consist of both formal and informal activities which should be addressed in their program plan. Some activities will have costs involved while others will not and some will be conducted during normal working hours while others will not.

Informal program activities might consist of one or more type of activities (e.g., intramural sports or various types of employee club activities). Generally, informal activities are coordinated by employees with a special interest in some aspect of a health-related topic but not necessarily included as part of an organization's formal employee wellness program.

When developing the program content, review the employee assessment information gathered from your focus groups or surveys to determine those activities that will produce the desired effect for your program.

Program Objectives, Expected Results and Evaluation.

The primary goal of each organization's program should be stated clearly so that both

management and employees understand the reason for investing their time and resources in the activities. The goal might include management goals of reducing health care costs or improving morale, or health goals such as reducing the incidence of heart attacks or back injuries. Bear in mind that if the program goal is to reduce health care costs or absenteeism, significant amounts of effort over at least five years will be necessary.

The organization's plan should include measurable objectives which allow the program to accomplish its goal and stated to show expected results from the program. Objectives in three categories (process, impact and outcome) should be included.

Process objectives are measurable, short term statements of what the program will do, such as "By Date/Month/Year, the Employee Wellness Program will recruit 50% of the employees to participate in a health screening /health fair to increase their knowledge about health risks and healthy behaviors."

Impact objectives are measurable, mid-term statements of what the program expects to happen as a result of its activities, such as "By Date/Month/Year, increase by 5%, from ____ to ____ the number of employees who participate in aerobic exercise at least two times/week."

Outcome objectives are measurable, long term statements of what the program expects will result from the implementation of the program, such as "By Date/Month/Year, decrease by 5%, from ____ to ____ the number of employees who report being overweight or obese.

Evaluation

The program plan should address program evaluation. Plans for evaluating the program will be made when the program objectives are set. Sophisticated, controlled studies and evaluations are unlikely to be appropriate for most organizations, unless a comprehensive and relatively expensive program is being undertaken.

Measures should be selected which allow the organization to determine if its objectives were met. Assessment of employee needs/interests/health risks before offering a program will allow for development of a baseline against which future measurements can be compared.

Determination of the number and types of employees who participate in programs, the skills or knowledge gained as a result of participation, and other simple techniques can allow for formative evaluation to occur during the program and adjustments to be made to ensure success.

Process evaluation measures could include the number and types of health education events held, number of employees participating in the events, number of calls or requests for more information, etc.

Impact evaluation measures could include the number and types of fitness classes held, number or participants in the classes, pre and post health assessment information, type of policies or system changes supporting the program were made in the organization, etc.

Outcome evaluation measures could include the number of employees showing a reduction in medical risk conditions, reduced absenteeism, improved morale, etc.

Program Categories

Most programs will be targeted to one or more of the following three levels: Awareness, Lifestyle Change and Supportive Environment. The program plan should identify activities from all three levels to be considered a more comprehensive program.

(1) Awareness. An awareness program increases the employees' level of awareness or interest in the topic of the program. Such programs often result in increased knowledge about healthy behavior and can be effective morale boosters and ways to publicize the program to a large number of employees. These types of activities are also an inexpensive way to begin the program. *Examples include newsletters, posters, health fairs, one-time education classes, brown bag seminars, and health screening without ongoing follow-up.*

(2) Lifestyle change. Lifestyle change programs are intended to change the health behavior of the employee. Health education and behavior modification are two common methods used. Such programs should continue at least eight to 12 weeks if they are to have any long-term impact. *Examples include ongoing fitness classes, regular meetings of weight loss groups, or extended stress management education.*

(3) Supportive environment. A supportive environment program is intended to create within the worksite an environment that encourages healthy lifestyles. The major elements of that environment are the physical setting, departmental policies and culture, ongoing programs and structure, and employee involvement in programs. *Examples include a Fitness Policy, No Tobacco Policy, Fitness Room and Showers, Healthy Food Stocked Vending Machines.*

If vigorous physical activity is part of an organization's program plan, the organization should consider that all employees who wish to participate first complete a physical fitness readiness questionnaire. This questionnaire will help determine which employees require consultation with a physician before beginning such vigorous activity. Further, all employees participating in such vigorous physical activity should have signed a statement of informed consent. The legal department of the organization should be consulted for wording and format of forms to be used.

Program Costs

It is not always possible to identify, at any point in time, all the activities which may be appropriate in conducting a successful employee wellness program. However, a budget should be developed that outlines the approximate costs for implementing such a program in general. The budget should be proposed to the organization's chief officers to identify what is required to carry out the organization's employee wellness program and should be reflected in that organization's business plan.

The following areas should be considered in the budget outline when developing the costs of the program:

- (A) Equipment and supplies which are needed for carrying out the program.*
- (B) Personnel and /or training costs which could include having staff members trained as leaders or instructors of health /fitness education activities.*
- (C) Incentives and awards may be provided for employees who participate in an organization's employee wellness program. Examples of such incentives and awards might include award ribbons, certificates, t-shirts, and other low-cost items of recognition.*
- (D) paying for employee memberships in health club;*
- (E) paying the registration fees for an organization's employees to enter teams in sports leagues;*
- (F) buying uniforms or other wearing apparel for an organization's sports teams;*
- (G) treatment services that may not be included in an employees' health insurance program such as physical therapy or treatment by a physician for hypertension or diabetes;*
- (H) onsite medical screening services (lipid panels) or preventive services (flu shots) and*
- (I) any other employee medical support costs, such as home blood pressure monitoring machines.*

The concept of cost sharing has been found to result in a high degree of commitment by those sharing in the cost. An organization may choose to cover 100% of the costs of certain program activities, to share the costs of some activities with participating employees, or to have employees pay 100% of the costs associated with certain program activities. Cost sharing should be addressed in the plan.

Program Scheduling

Program activities may be considered to be scheduled before, during, between, or after normal working hours as deemed appropriate by each organization's chief executive.

Program Coordination

A successful employee wellness program will require appropriate planning, coordination, and implementation. An organization wishing to have such a program will designate an employee wellness coordinator who would devote on-duty time to the effort. It is unlikely that a successful program can be administered on a strictly volunteer basis after working hours.

Section 3

Worksite Wellness Plan Outline and Checklist

Organizations may want to seek opportunities to enter into agreements with other entities in the area that offer access to health education or fitness activity programs. Such cooperation will be particularly useful when services cannot be offered at the worksite.

Section 3

Worksite Wellness Plan Outline and Checklist

The following review checklist can be used by the organization to determine the extent to which the plan has identified health needs of the employees and has systematically reviewed program activity options that will help it to successfully improve the health and wellbeing of those employees and the organization.

A. Program Description			B. Program Objectives			C. Program Evaluation		
1. Program Purpose			2. Program Objectives			3. Eligibility Requirements		
a. Description of program purpose	Y	N	a. Primary goal stated	Y	N	a. All employees eligible	Y	N
			b. Measurable objectives stated	Y	N	b. Family members eligible	Y	N
c. Evidence of employee needs, interests considered in planning			Y	N				
4. Use of Facilities			5. Providers of Instruction/Services			6. Program Content		
a. Facilities available for use are described	Y	N	a. Providers qualifications described	Y	N	a. Formal activities relate to program objectives and purposes	Y	N
			b. Fitness providers meet qualifications outlined in these sections	Y	N	b. Formal activities listed under		
						* Awareness	Y	N
						* Lifestyle change	Y	N
						* Supportive Environment	Y	N
						c. Employee participation in onsite programs or screening is addressed by legal	Y	N
7. Program Costs			8. Program Scheduling			9. Program Coordination		
a. Budget outline prepared	Y	N	a. Statement of Schedule	Y	N	a. Wellness coordinator designated	Y	N
b. Source of funds identified	Y	N				b. Evidence of attempts at coordination with other programs and services in the area.	Y	N
c. Costs are considered for:								
* facilities modification	Y	N						
* providers of instruction/services	Y	N						
			10. Expected Results					
			a. Statement of expected results	Y	N			
			b. Expected results conform to objectives.	Y	N			
			c. Evaluation methods described which are appropriate to stated program objectives	Y	N			