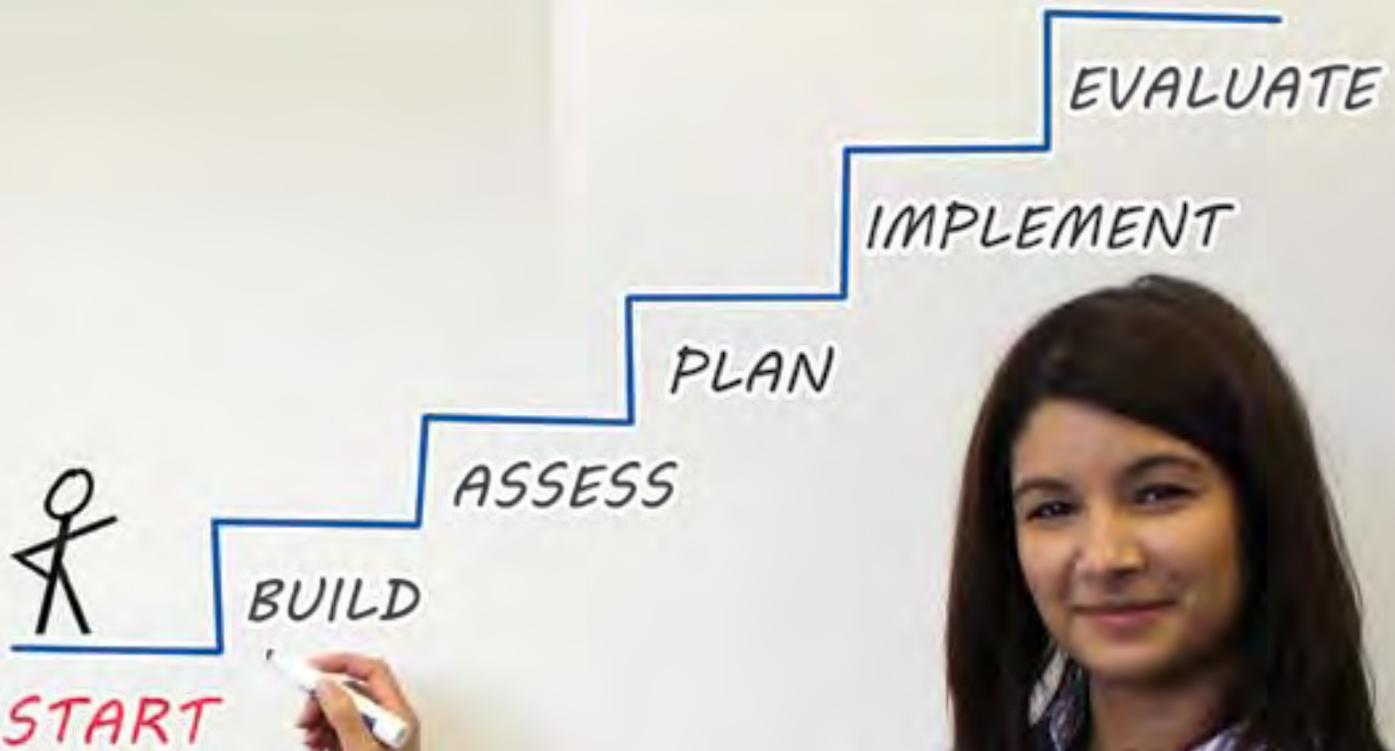


NEBRASKA
WORKSITE
WELLNESS

Toolkit

www.worksitewellness.ne.gov



Department of Health & Human Services



In partnership with:





INTRODUCTION

Why worksite wellness?

Nebraskans spend an average of nearly nine hours a day at work—more awake hours than any other place.¹ With increasing costs related to health care, workers compensation, turnover and productivity, employers are reaching for sustainable solutions to manage a growing workforce. Since employees are an organization's greatest asset, and much of the financial burden lands on the employers, it makes good business sense to strive to develop a worksite environment that helps employees to stay or become healthy. Creating a worksite wellness program is a wise investment for the organization that will yield long-term dividends. These benefits are not only monetary but also relate to the quality of life for employees, their families, the organization and ultimately, the community.

How to use the toolkit?

This Nebraska Worksite Wellness Toolkit is a easy-to-use guide for organizations to follow to effectively develop a comprehensive worksite wellness program. The Toolkit is available both in a document and online. Organizations are given detailed steps to follow to build or expand worksite wellness efforts. The website contains additional resources beyond the Toolkit document and connects business with up-to-date information to support their programs.

Here are some ideas of how businesses can use the Nebraska Worksite Wellness Toolkit:

1. *Print the entire document or each chapter and share it with wellness committee members.*
2. *Save the website as a “favorites tab” for easy access and to check regularly for additional resources.*
3. *Develop an action plan to create or enhance your organization’s worksite wellness efforts.*
4. *Review the case studies, quotes, active links and special considerations in each chapter to gain more information.*
5. *Seek additional assistance from the Wellness Council experts from [WorkWell](#), [WELCOM](#), and the [Panhandle Worksite Wellness Council](#).*
6. *Document activities by using the checklists made available at the end of each chapter or on the website.*
7. *Share successes with other businesses who may be beginning their wellness program.*

¹Bureau of Labor Statistics, 2010, American Time Use Survey, 2010.

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BUSINESS CASE FOR WORKSITE WELLNESS

Proven cost savings due to wellness:

- ▶ **State of Nebraska:**
For every \$1 spent on their program, health care savings were estimated at \$2.70.
- ▶ **Lincoln Industries:**
For every \$1 spent on their comprehensive health and wellness program, savings were estimated at \$5.00.
- ▶ **University of Michigan:[Ⓞ]**
For every \$1 spent on their workplace health programs, savings were estimated at \$1.50 to \$2.50.
- ▶ **Dupont (USA):[Ⓞ]**
For every \$1 spent on their company health promotion program, savings on just their disability expenses were estimated at \$2.05 after 2 years.
- ▶ **Coors Brewing Company:[Ⓞ]**
For every \$1 spent on their fitness program, savings were estimated at \$6.15.

Worksite wellness makes good business sense

Beyond the financial returns of an effective wellness program where employees' quality of life is improved through healthy eating habits and increased physical activity, lower stress levels, and a reduction in illness and injuries, there are other very strategic reasons why a worksite wellness program makes good business sense.

▶ **Improved productivity and performance**

First, an effective employee wellness program improves the overall productivity and performance of employees and the organization. The employer benefits from healthier employees who are more productive on the job and are absent less. This leads to reduced sick leave, a more consistent workforce, and a decreased need for temporary workers or increased workload on co-workers.

▶ **Improved morale**

Second, a company that demonstrates that it cares about its employees by offering a worksite wellness program is often viewed as a better place to work and perceived as an organization that demonstrates a social responsibility to the community. The improved morale, increased engagement, and enhanced company image provided by a wellness program improve both recruitment and retention of talented employees.

▶ **Cost savings**

Third, the monetary value of worksite wellness programs is well established. Well-designed and executed worksite wellness programs have resulted in great cost savings for many organizations, such as the ones described to the left.

▶ **Improved corporate image**

Finally, there is another business issue that impacts every company: a company's reputation or organizational profile can be a critical factor in the marketplace. While difficult to quantify, no CEO would argue with the idea that their corporate image is incredibly important in relation to the prosperity and success of the company.

[Ⓞ]Bachmann, "Health Promotion at Work," 5-7; J. E. Fielding, "The Proof of the Health Promotion Pudding Is...", *Journal of Occupational Medicine* 30, no. 2 (February 1998).

[Ⓞ]T. Golaszewski, "Shining Lights: Studies that have Most Influenced the Understanding of Health Promotion's Financial Impact," *American Journal of Health Promotion* 15, no.5 (May/June 2001).

[Ⓞ]Jacqueline Taggart and Jamie Farrell, "Where Wellness Shows up on the Bottom Line," *Canadian HR Reporter* 16, no. 18, (October 20, 2003): 12

The evidence-based process for worksite wellness

While there is not a “one size fits all” approach to worksite wellness, 30 years of experience and evidence from research have proven that there is a step-by-step process to develop an effective worksite wellness program. Each chapter of this toolkit includes action items for each of these steps for businesses that are beginning or growing wellness initiatives.

- › **Build** the foundation to support your program.
- › **Assess** your organization’s needs and interests.
- › **Plan** the objectives that your wellness program will address.
- › **Implement** the activities that will help achieve your program’s objectives.
- › **Evaluate** your program.

It may take several months going through the steps outlined in this toolkit to launch a worksite wellness program, but the resulting outcomes experienced will be well worth the time and investment. This toolkit also offers ideas to help slowly shift an organization’s culture in the right direction if the current culture is not supportive of wellness.

Special considerations for small businesses:

This toolkit offers special considerations to tailor worksite wellness programs to improve the health of employees at organizations with fewer than 50 employees. These recommendations will be provided in the sidebar in each chapter.

Make it easy. Join a wellness council.

Your local wellness council can offer support through the entire process of developing and expanding a worksite wellness program.





STEP 1:

BUILD THE FOUNDATION

Step 1 Action Items

1. Obtain support from senior management
2. Designate an individual to administer wellness programs
3. Form a wellness committee
4. Begin marketing the wellness program

If you struggle to obtain sufficient support from your leadership, consider the ideas below:

- ▶ Create a "pilot" wellness program that will allow managers to experience some of the elements and activities that you are planning to include in your wellness program. Positive feedback and outcomes from your pilot wellness program can be used to justify the development and implementation of a full wellness program.
- ▶ Utilize a [leadership survey](#) to help you assess changes in leadership attitudes as a result of your pilot wellness program.
- ▶ Call on supportive senior managers to convince more hesitant leadership team members of the benefits of a wellness program and the resources needed to create one.

CONTINUED ON PAGE 7

1. Obtain support from senior management

Senior management support is essential to the development and sustainability of any wellness program. The support of senior leadership:

- ▶ *Allows for the integration of wellness into the organization.*
- ▶ *Provides necessary financial resources to support the wellness program.*
- ▶ *Offers opportunities to implement policies that support health.*
- ▶ *Helps share success stories within the company.*
- ▶ *Links health promotion objectives to business outcomes.*

Ideally, the senior leadership will make wellness part of the overall strategic planning process. Incorporating wellness into the organization's strategy will motivate management to support the objectives and initiatives of the wellness program. All levels of management should participate in wellness programming. This can be accomplished by including wellness goals and responsibilities in management job descriptions and/or performance objectives.

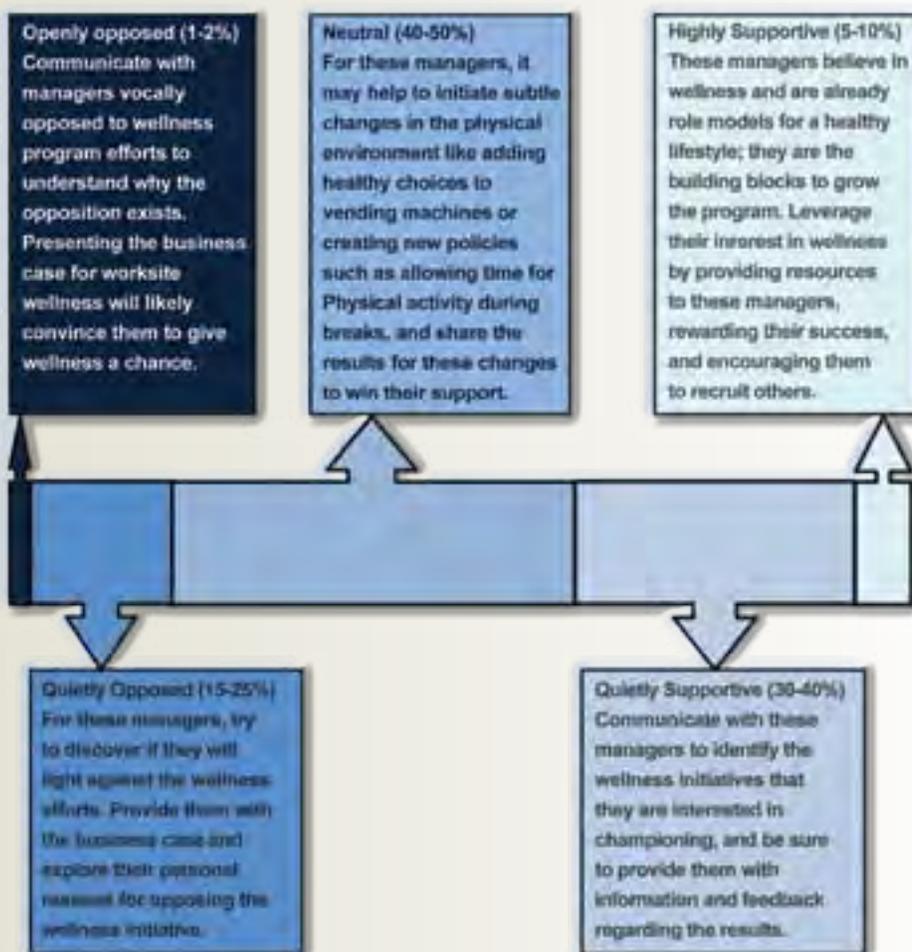
How to request support:

- ▶ *Provide senior management with a summary of the "[Business Case for a Wellness Program](#)."*
- ▶ *Outline and discuss the financial resources and support needed to develop the program.*
- ▶ *Work with leadership to establish goals and expectations for the wellness program.*
- ▶ *Request the commitment and participation of senior management.*

SENIOR MANAGEMENT SUPPORT IS ESSENTIAL TO THE DEVELOPMENT AND SUSTAINABILITY OF ANY WELLNESS PROGRAM.

Creating support

If there is an initial lack of support from leadership, concentrate on engaging one person at a time to gradually build support for a wellness program. Research has shown that the attitudes that managers hold towards wellness tend to lie along a continuum ranging from openly opposed to highly supportive potential champions.



- ▶ Tailor your approach to the attitudes of the managers. Be sensitive to their personal experiences regarding wellness.
- ▶ If you have a limited budget, start with lower cost options for your wellness efforts, implementing more activities in later years once you gain support.

BUILD



STEP 1:

BUILD THE FOUNDATION

2. Designate wellness coordinator

Special considerations for small businesses

A small business may not have the resources to designate a wellness coordinator or form a wellness committee. Instead, get started by identifying a wellness champion. The wellness champion does not have to be the healthiest employee, but should be well-respected by the other employees at the worksite and possess the ability to motivate others to succeed. In addition, the wellness champion should participate in wellness efforts and encourage others to participate as well.

A full or part-time wellness coordinator may be designated to manage the wellness program. A wellness committee is still necessary to help share some of the duties required to carry out wellness efforts, but having a qualified person responsible for the program increases the likelihood that the program will be effective.

The wellness coordinator will be the face of the wellness program, lead the wellness committee, and serve as a point of contact for employees regarding the wellness program. When choosing a wellness coordinator, ensure that this person has the time and ability needed to invest in the wellness program. If there is not an appropriate person currently on staff, consider hiring a wellness coordinator or contracting with a third party to help execute the program.

3. Form a wellness committee

A wellness committee is a team of employees who formally meet and plan activities to promote good health for themselves and for their coworkers. The wellness committee should focus on planning activities and events, recruiting coworkers to participate in the program, and evaluating the wellness program.

Benefits of wellness committees:

- ▶ *Committees create ownership*
- ▶ *Committees help spread out the workload*
- ▶ *Committees inspire creativity and provide great ideas*

Wellness committee responsibilities:

- ▶ *Collect wellness-related data about the worksite and from employees*
- ▶ *Establish wellness program goals and objectives*
- ▶ *Participate in the wellness program budget process*
- ▶ *Establish and implement wellness programs activities*
- ▶ *Participate in wellness program activities*
- ▶ *Represent coworkers' ideas and concerns*
- ▶ *Act as the eyes, ears and voice of the wellness program*
- ▶ *Help create a healthy organizational culture*

Check out the North Carolina [Health Smart Worksite Wellness Toolkit's Committee Workbook](#) for more information on forming a wellness committee.

Considerations when defining a wellness committee

Structure – Develop either a formal structure with bylaws and elected positions or an informal structure.

Leadership – If a wellness coordinator is not leading the wellness program, clearly define a committee leader who:

- ▶ *Is connected with the organization's strategic direction and has the ability to integrate it with the vision for the wellness program,*
- ▶ *Is willing and able to communicate about the wellness program to employees at all levels within the organization, and*
- ▶ *Has mentorship skills and the ability to empower others.*

Member selection – Committee members can volunteer or senior leadership can appoint members. Being active and healthy should not be a requirement; inviting skeptical employees may provide a future opportunity to engage other employees who are hesitant to participate in wellness efforts.

Diversity – The committee members should represent all levels of the organization (senior management, representation from all shifts, human resource personnel, information systems representatives, safety coordinators, marketing and communications staff, union representatives and healthcare professionals). The involvement of decision makers is particularly important for moving the initiative forward.

Size – Committee size depends on the size of the organization and the scope of the wellness program, but should be large enough that at least a majority of the committee members will be able to attend regular committee meetings.

Commitment – Senior management should communicate expectations for participation in committee meetings and wellness program activities. Establish clear roles and responsibilities for each committee member, and routinely recognize committee members for their efforts.

Frequency – How often to meet will depend on the goals of the committee, and may increase over time, at certain times of the year, and at different stages of program development. The committee should meet quarterly at a minimum, but once a month is typical. Only meet when there is a significant agenda.

Term length – Set alternating 1 or 2-year terms for committee membership so others can have the opportunity to participate.

Wellness champions

In very large companies or organizations with multiple locations, it may be necessary to recruit wellness champions to communicate with employees on a more personal level. The champions can help provide motivation, information and support for employees who are participating in wellness activities, as well as provide a mechanism for feedback to the wellness committee.

Nebraska Case Study

When the State of Nebraska launched the [Wellness Options Program](#), it became one of the first states to offer an integrated wellness program tied to health plan coverage. Each year, Wellness Champion Award recipients are selected for their involvement, actions and efforts that contribute toward achieving wellness goals, promote and support wellness in their work areas and lifestyles, and demonstrate a positive attitude that inspires and motivates others. In addition, the 'Wellness Wall of Fame' recognizes wellness program participants who are making some pretty amazing lifestyle changes resulting in significant health improvements. Participants whose stories are posted on the "Wall of Fame" receive a picture with and personal letter from the Governor, and attend the Governor's Annual Wellness Award Luncheon.



STEP 1:

BUILD THE FOUNDATION

4. Begin promoting the wellness program

"Our wellness program is far greater than a simple benefit. It is a key aspect of our strong employee culture. We have seen tremendous return on our efforts through more engaged employees, higher retention and overall involvement from the employees and their families."

- Lindsay Cosimano,
Chief Marketing Officer,
[CQuence Health Group](#),
Omaha, Nebraska

As with any initiative, communication is essential to the success of a wellness program. Ensure that employees are receiving clear and consistent messages regarding the wellness program. These messages should emphasize that employees are the most important asset to the organization and the potential benefits for employees who participate. Effective communication demonstrates the importance of wellness to the organization and encourages program support and participation. When promoting the wellness program, be sure to communicate frequently using simple messages and remember that communication includes not only words, but actions as well. Using multiple modes of communication, such as email, intranet, posters, bulletin boards, table cards, correspondence to the home, one-on-one promotion, and in-person meetings will increase the likelihood that the message will reach all employees.

Leverage leadership support

Although the wellness committee will be responsible for most of the communication regarding the wellness program, messages from senior leadership can help encourage participation in the wellness program. A communication process in which management is provided with wellness committee minutes or conducting regular management update meetings may be necessary to confirm that all levels of management understand and continue to support the wellness program.

Brand the program

Creating a name and logo for the wellness program will help employees recognize the elements of the wellness program. Some organizations may have the internal resources to develop a brand. If not, create a contest encouraging employees to create a name and logo for the wellness program. This can also boost interest in wellness efforts that may lead to higher participation in the future. Another option is to leverage the existing company brand by altering the current logo slightly. This strategy emphasizes a connection between the wellness program and the organization's overall strategic goals.

*A CULTURE OF
WELLNESS IS ONE
IN WHICH THE
HEALTHY CHOICE IS
THE EASY CHOICE.*

Build the Foundation Checklist:

- Obtained support from senior management*
COMMENTS: _____

- Designated an individual to administer wellness programs*
COMMENTS: _____

- Formed a wellness committee*
COMMENTS: _____

- Marketed the wellness program to employees*
COMMENTS: _____

Nebraska Case Study

Fremont Area Medical Center in Fremont, has assembled a committee of "experts" in their respective fields, including dietitians, exercise specialists, marketing and communications representatives, human resources staff and administration. The committee has worked hard to provide a variety of ways to motivate and educate employees on their journey toward better health. They have found that administration, management and staff need to understand the importance and direction of the wellness program to encourage participation.



STEP 2: ASSESS THE WORKSITE

STEP 2 Action Items

1. Collect data
2. Communicate the results

Tips for data collection and use

- ▶ If you are just starting a wellness program at your worksite, focus on gathering the information that is easiest to collect.
- ▶ Use multiple data sources – a single tool that will collect all the necessary information does not exist.
- ▶ Commit to honesty in analyzing data.
- ▶ Remember that all the information gathered is confidential.
- ▶ Protect the individual's privacy at all costs.
- ▶ Use incentives to drive participation.
- ▶ Commit to collecting data at least once every other year.
- ▶ Keep it simple.
- ▶ Identify overlaps between worksite needs and employee interests when possible.

Data is essential to the development of an effective wellness program because they identify health risks and employee interests. Assessing the worksite's needs and interests before determining which programs or interventions to offer ensures that the program will make the most efficient use of time and budget. In addition, this information establishes a baseline to use to set goals and measure progress and change over time, so collect data at least every other year to allow for comparison.

Important data to collect will fall into one of two categories:

- ▶ **Interest data** allow identification of what employees want to obtain from the wellness program. When collecting data from employees, participation is highly important.
- ▶ **Needs data** help determine what the program must address to make an impact in the health of employees.

Obtaining responses that are representative of the entire organization's interests and needs allows creation of a wellness program that is widely appealing and effective. Ideally, data will show that risk areas with high need are also of high interest to employees. However, employee interests may not always match up with needs observed by data from a Health Risk Assessment or health care costs. In such cases, it may be prudent to address these needs even without the interest of the employees.

1. Collect data

It is important to collect as much data as possible, with the understanding that not all data sources may be available. As the program becomes more advanced, work to include more of the following data sources to ensure that the program is addressing all of the organization's needs.

Interest data

Employee interest data identifies what employees want to obtain from a wellness program. Gathering interest data provides an opportunity to communicate goals and engage employees in the development of the wellness program. Without input from employees, valuable resources can easily be wasted by planning activities that employees will not utilize. Interest data can be collected through several venues. Many Health Risk Assessments include a section on employee interests, but [interest surveys](#), focus groups, emails or even one-on-one discussions can also provide opportunities to obtain interest data. Regardless of the method used to collect interest data from employees, there are five key elements to address:

- ▶ *What are the primary health interests of employees and/or spouses?*
- ▶ *What barriers would prevent employees from participating in a wellness program?*
- ▶ *Are employees willing to contribute to the cost of a wellness program?*
- ▶ *What time of the day is the best to schedule program activities?*
- ▶ *What is the preferred teaching/learning method?*

Needs data

Demographic information

As with any successful campaign, it is important to understand the intended audience. Each of these characteristics can dramatically alter the wellness activities a company can or should offer:

- ▶ *Percent male/female*
- ▶ *Average age*
- ▶ *Education level*
- ▶ *Race/ethnicity breakdown*
- ▶ *Language breakdown*

Nebraska Case Study

As part of its "Healthy U" Wellness Program, the [University of Nebraska Foundation](#) in Lincoln, develops each year's wellness program activities based on data. Their data sources include health screening and Health Risk Assessment data, the previous year's program results, and goals for the upcoming year. In addition, employees are asked to choose a health objective each year based on their individual health screening results. They have found that program objectives based off of employees' personal goals and aggregate data allow them to address areas that are not only universally important, but also impact individual lives.

ASSESS



STEP 2: ASSESS THE WORKSITE

Best practices when offering an HRA:

- ▶ Give employees ample opportunity to complete the HRA – a two-week timeframe is recommended.
- ▶ Communicate frequently about the HRA using a variety of methods.
- ▶ Ensure employees that data will be collected in aggregate form and will not be shared with their supervisors.
- ▶ Make the process as easy as possible for employees by allowing them time during the workday.
- ▶ Offer an incentive for completing the HRA.
- ▶ Allow spouses to complete the HRA.
- ▶ Encourage HRA participants to share their personal report with their healthcare provider.

How to choose an HRA:

Your local wellness council [WorkWell](#), [WELCOM](#), and the [Panhandle Worksite Wellness Council](#) can provide assistance with choosing the right HRA for your organization, as well as all aspects of creating or improving a wellness program.

Health risk assessment

A Health Risk Assessment or Appraisal (HRA) is considered the primary data collection tool for wellness program development. An HRA is a survey that will identify the areas of risk in the health of employees such as tobacco use, low physical activity levels, poor nutrition, high stress and low rates of preventive screenings. An aggregate report will depict the responses of all participating employees grouped together. Ensure that all employees understand that their personal information is completely private and that they cannot be punished by any responses they provide on the survey so that the information they provide is as accurate as possible. Base the priorities and goals of the wellness program on the data and information gathered from this assessment. In addition, an HRA can assist individuals in determining their positive health behaviors, gaps in service or benefits, readiness for change, and areas for improvement by providing an individual report.

Which HRA to use depends on the organization's needs and resources, but most importantly, an HRA should be offered at least every other year or every year if possible to get an accurate picture of the company's health. In addition, HRAs are most useful when the organization's results can be compared from year to year, so choose an HRA wisely, and try to use the same survey each year.

HRA results will categorize employees from low risk to high risk, and all levels in between. All groups are important to address in a wellness program. Too often, businesses focus on only the unhealthy or high risk employees; however, a mature wellness program offers programs to address all risk levels. Low risk individuals should be rewarded for being healthy and encouraged to remain at that level. At the same time, high risk individuals need encouragement and the opportunity to improve their personal health.

Health screening data

Health screenings provide an opportunity to obtain more objective data on the health risks of the organization while providing awareness and education to its employees. Health screenings are an essential component of a wellness program if the leadership is interested in “results.”

Recommended screenings:

- ▶ Blood pressure
- ▶ Cholesterol (total, HDL, and LDL)
- ▶ Height and weight
- ▶ BMI or waist circumference
- ▶ Glucose

Other screenings available:

- ▶ Body composition
- ▶ Flexibility
- ▶ Pulmonary (lung) function
- ▶ Full blood chemistry profile

Health screenings can sometimes be processed through health insurance as preventive care to reduce or eliminate the costs of the screenings. Another option would be to ask a local public health department, local health system, college or university to perform a health screening at a lower cost. Health screening vendors will often perform the screening onsite as a convenience to the employees. In addition, many vendors use the results from the health screening to assign a “health score” to each employee, which can be tracked over time. Often, a health screening vendor will also conduct a follow up meeting with employees to explain the results, and offer health coaching to those employees whose results require action. If planning to offer a health screening, schedule the screening to occur before the HRA and allow time for the employees to receive their results, as many HRAs ask participants to enter health information such as blood pressure, cholesterol, glucose, etc. In addition, before the screenings occur, ask the vendor to provide aggregate results for the employees who choose to participate. Very small organizations may not be able to receive aggregate information due to [HIPAA](#) restrictions, but the employees will still benefit from the opportunity to have the screenings performed onsite.

Common barriers to collecting HRA and screening data:

Despite your best efforts, you may end up with a lower participation rate in your HRA or your health screening than you anticipated. There are several factors that may contribute to low participation:

- ▶ More than 500 employees
- ▶ Multiple shifts
- ▶ Multiple worksite locations not within walking distance
- ▶ Multiple languages
- ▶ More than 70% male
- ▶ Government organization
- ▶ 501c3 organization
- ▶ More than 30% of workforce does not have access to a computer
- ▶ No health or wellness professional employed onsite

Worksites with any of these characteristics may need to provide additional incentives, offer a longer window of time or more opportunities for the employees to participate. Worksites may also want to communicate the benefits of these assessments more frequently to get enough participation in data collection efforts to be representative of the entire organization's needs and interests.



STEP 2:

ASSESS THE WORKSITE

Health care claims describe only approximately 30% of an organization's employees, so use this information in addition to (and not instead of) HRA results to ensure that all risk areas are addressed.

Health care costs

Many employers want to provide wellness programs to help reduce increasing health care costs. Before starting a wellness program, identify the total cost of health insurance each year. Also note the total cost of health insurance per person, and how much the employer and the employee each contribute to the total. Other information to assess includes the deductible, co-pay, and out of pocket maximum per person, as well as the total claims cost, the cost of prescriptions, and utilization of doctor's office visits. This information can be obtained from the human resources department or the health insurance provider.

Absenteeism

Small improvements in wellness can lead to quick reductions in absenteeism. When first starting the program, collect baseline information on the absenteeism of employees to compare with absenteeism data measured later, after engaging in wellness. If a time bank is one of the benefits provided to employees—limiting the ability to track sick leave—then use self-report to assess what proportion of missed work was due to illness or injury.

Performance

Baseline information on the productivity of employees can also be collected. Positions for which it is easy to quantify productivity, such as the number of items produced on an assembly line or the number of recruiting calls made, allow for comparability before and after starting a wellness program. However, since productivity varies by individual, position and organization, using a [standardized tool](#) can help to measure and describe productivity across the entire organization.

Health culture audit/health climate analysis

A [culture audit](#) or health climate analysis measures employee perception of management's and co-worker's commitment to health and wellness. A culture supportive of health and wellness is essential to the long-term success of a wellness program, and tracking improvements in culture over time provides realistic expectations for improvements in outcomes from year to year.

Other data sources

A review of reoccurring themes from these sources, combined with health risks and interest data, will help determine target wellness program areas:

- ▶ *Accident and safety records*
- ▶ *Worker's compensation claims*
- ▶ *Short and long-term disability claims*
- ▶ *Management surveys*
- ▶ *Employee retention data*
- ▶ *Physical environment audit (workstation ergonomics, heating and ventilation conditions, stairwell access, cafeteria setup, etc.)*

Summary of data sources

The table below summarizes helpful data sources that may be available when developing a wellness program:

DATA SOURCE	COST	SOURCE	FREQUENCY
Basic Program:*			
Interest Survey	No to low cost	In house or vendor	At least every other year
Demographic Information	No to low cost	Human Resources	At least every other year
Health Risk Assessment	No to medium cost	In house or vendor	At least every other year
Advanced Program:**			
Health Screenings	Medium to high cost	Vendor	At least every other year
Health Care Costs	No cost	Insurance provider	At least every other year
Absenteeism	No cost	Human Resources	At least every other year
Optional:			
Productivity	No to low cost	In house or vendor	As needed
Health Culture Audit	No to low cost	In house or vendor	As needed
Environmental Audit	No to low cost	In house or vendor	As needed
Management Survey	No to low cost	In house or vendor	As needed
Employee Engagement Data	No cost	Human Resources	As needed
Accident/Safety Records	No cost	Human Resources	As needed
Worker's Compensation Claims	No cost	Insurance provider	As needed
Disability Claims	No cost	Insurance provider	As needed

*Data sources required for the Sower level of the [Governor's Wellness Award](#).

**Additional data sources for the Growers level of the [Governor's Wellness Award](#).



STEP 2:

ASSESS THE WORKSITE

2. Communicate results

Special considerations for small businesses

Many of the data sources listed in this chapter are typically inaccessible for a small business. To get started, collect data on employee interests and health risks by providing an HRA to employees. Due to company size, aggregate HRA reports may not be possible to protect the privacy of the employees. Free, paper-based HRAs are available online. Though small organizations are usually not able to obtain as much data as a large organization, it is typically easier in small firms to achieve high levels of participation for an HRA, as wellness committee members can personally encourage other employees to take it. If conducting a health screening to assess biometric data is not feasible in the first year of the program, then make an effort to add this benefit in a future year.

After collecting and analyzing data, it is important to communicate the results with the rest of the organization. Provide an executive summary to management, answering these five questions:

- **Why** was the data collected?
- **Who** was the target group and how many responded?
- **How** (HRA, culture audit, etc.) and when was the data collected?
- **What** did the data suggest?
- **What** do the results mean in dollars and cents?

In addition, provide a summary to all the employees, including the same information provided to management, but excluding the explanation of costs associated with the results. After communicating the results, use the data that was collected to guide the development of program activities, or employees may not be willing to take another survey again. One way to combine sharing and using the results is to draft a letter from the senior leadership discussing the data collected, the new wellness plan, and invite employees to become involved.



Assess the Worksite Checklist - Collected data on:

- Employee interests

COMMENTS: _____

- Demographic information

COMMENTS: _____

- Health risks

COMMENTS: _____

- Health screening data

COMMENTS: _____

- Health care costs (if available)

COMMENTS: _____

- Absenteeism

COMMENTS: _____

- Communicated the results

COMMENTS: _____

"Wellness truly is a core pillar at [Union Bank & Trust](#) and it starts with our CEO and cascades throughout the entire organization. Our metric, driven wellness focus has created positive and measurable results. Participating in our wellness initiatives is not a hope we have, it is an expectation. In order to stay on the cutting edge we choose our partners carefully and [WorkWell](#) has been a constant ally in our mission to serve our associates and families wellness needs."

- Chad Thies,
First Vice President,
Human Resources,
Union Bank & Trust,
Lincoln, Nebraska



STEP 3: CREATE A WELLNESS PLAN

STEP 3 Action Items

1. Create a mission statement
2. Construct a written wellness plan
 - Use data to identify 1 to 3 priority areas
 - Develop measurable objectives to address priority areas
 - Determine methods to measure outcomes
3. Build a wellness budget
4. Draft a long-range plan

Mission statement samples:

"To encourage employees' personal and professional productivity and physical and mental well-being, the mission of (Organization Name's) Worksite Wellness Program is to promote a worksite culture that supports employees' desire to make healthy lifestyle choices."

Written wellness plans:

- ▶ Formalize efforts.
- ▶ Focus on priority health issues.
- ▶ Measure impact and validate the program.
- ▶ Provide continuity through personnel/wellness team changes.
- ▶ Link wellness to the corporate strategic plan.

1. Create a mission statement

To keep the wellness program on track, create a mission statement to guide planning efforts. Keep the mission statement short and simple, reflecting the focus of the wellness program in one to two sentences. Be sure to communicate the mission statement with employees. By reading the wellness program mission statement, employees should be able to understand the purpose of the program, as well as how program goals will be attained and how achievement of those goals will be confirmed. Mission statements should align with corporate strategy—or better yet—wellness should be an integral part of the overall corporate strategic plan.

2. Construct a written wellness plan

Ideally, the wellness plan will consist of purposefully developed and implemented wellness programming as well as policies and activities that target appropriate health risk behaviors and the interests of the employees. The next chapter of this toolkit will provide examples of each of these types of strategies. To create a wellness plan, identify priority areas and create measurable objectives to address those areas. Taking the time to determine objectives beforehand is the only concrete way to demonstrate the outcomes achieved as a result of wellness program efforts. The objectives will serve as benchmarks for future evaluation of the program and will help determine where to focus future efforts.

▶ *Use data to identify priority areas*

The written wellness plan should address primary health concerns as identified by the data. When reviewing data to identify priority areas, remember that addressing health concerns that are consistent with both the organization's needs and the interests of employees will have the highest impact. In addition, it is advisable to start with a need or interest area that can be resolved quickly and with little effort. For example, if the data show that employees desire healthier options in the vending machines, this interest could be easily addressed by working with the vendor to substitute for healthy options. Achieving success in these "low-hanging fruit" issues will build visibility, momentum, and support for the program. Focusing on 1 to 3 priority areas at a time will ensure that sufficient resources can be dedicated to each of the target areas. Once improvement is seen in those areas, add new issues to address in future wellness plans.

Nebraska Case Study

[Nebraska Methodist College](#) in Omaha, has integrated wellness into the college's strategic plan to ensure that the culture of wellness continues to be an important part of the college. The President's Council on Wellness has aligned its Operating Plan's action steps with one of the college's three cornerstones: People, Process, and Purpose. The alignment of the plan with the college's strategic plan makes it clear that wellness is a critical component of the organization's ultimate success.





STEP 3:

CREATE A WELLNESS PLAN

Special considerations for small businesses

To get started:

- a. Focus your efforts on one or two priority areas from your data to avoid taking on too much too quickly.
- b. Write objectives with whole person numbers rather than percentages to more easily track progress over time.
- c. Create objectives that are achievable to build momentum as you succeed, which will allow you to continually build your program. The most achievable objectives will be based on the interests of the employees, but programs addressing tobacco cessation, stress reduction and injury prevention tend to yield quick results.

▶ Create measurable objectives

Once priority areas have been selected, the next step is to create measurable objectives to address the priority areas. Clear objectives can help leadership and employees understand the reason for supporting and participating in the wellness program. Objectives should be specific, measurable, achievable, relevant and time-bound (SMART).

▶ How to write SMART objectives

- ▶ Identify WHO is targeted in the objective.

Example: employees.

- ▶ Identify WHAT change is desired. Let the data decide.

Example: reduce tobacco use.

- ▶ Identify HOW MUCH the behavior needs to change. Include baseline and desired change.

Example: from 30% to 28%.

- ▶ Identify BY WHEN the change should occur. Set a date! Most wellness plans are set on a twelve month calendar; however, it may be reasonable to set a longer date – up to two years.

Example: by December 2015.

After identifying these pieces of information, the **example objective would be:** Reduce tobacco use among the organization's employees from 30% to 28% by December 2015.

Enter your measurable objectives into a [wellness plan template](#).

View a [sample wellness plan](#) addressing tobacco cessation that follows the recommendations listed for creating achievable objectives.

▶ *Types of objectives*

There are three types of objectives that will frame the creation and evaluation of the program:

- ▶ **Process Objectives** refer to what the program will implement. This type of objective is especially important for businesses that are just starting a wellness program.
Example: *By December 2013, the program will recruit 40% of its employees to participate in nutrition classes to increase their knowledge of healthy eating behaviors.*
Example: *By March 2014, the program will conduct two weekly fitness classes to increase opportunities for involvement in physical activity behaviors among employees.*
- ▶ **Impact Objectives** refer to what the program is expected to achieve as a result of its activities in the short term. Impact objectives should be health-related. Choose at least one impact objective to focus on each year.
Example: *By December 2013, increase the number of employees who are taking daily walking breaks from 10% in 2012 to 20%.*
Example: *By May 2014, increase the number of employees who consume the recommended amount of fruits and vegetables daily from 5% in 2013 to 8%.*
- ▶ **Outcome Objectives** refer to what the program is expected to achieve as a result of its activities in the long-term. These can be either health-related, or focused on reducing costs in more advanced programs.
Example: *By December 2015, reduce the percentage of employees who are overweight or obese from 45% in 2012 to 40%.*
Example: *By May 2015, decrease the percentage of employees who use tobacco from 12% in 2013 to 6%.*

Nebraska Case Study

In Wilber, the worksite wellness movement started in 2009 when the [Saline County Commissioners](#) and the Saline Safety Committee partnered to create a 24-hour fitness center offering free membership to employees. After completing a Health Risk Assessment in 2012, they discovered that many of their employees suffered from high blood pressure and high cholesterol. They started adding articles and tips in the employees' paychecks, as well as sending out information through email about how exercise and healthy eating can help improve those conditions. They also offered healthy snacks to employees for lower prices than what is available in the worksite vending machine.

Saline County learned that it is important to have a big goal in mind, but to make small goals to help achieve that goal. Reaching each small goal is a little victory and motivates people to not give up.



STEP 3:

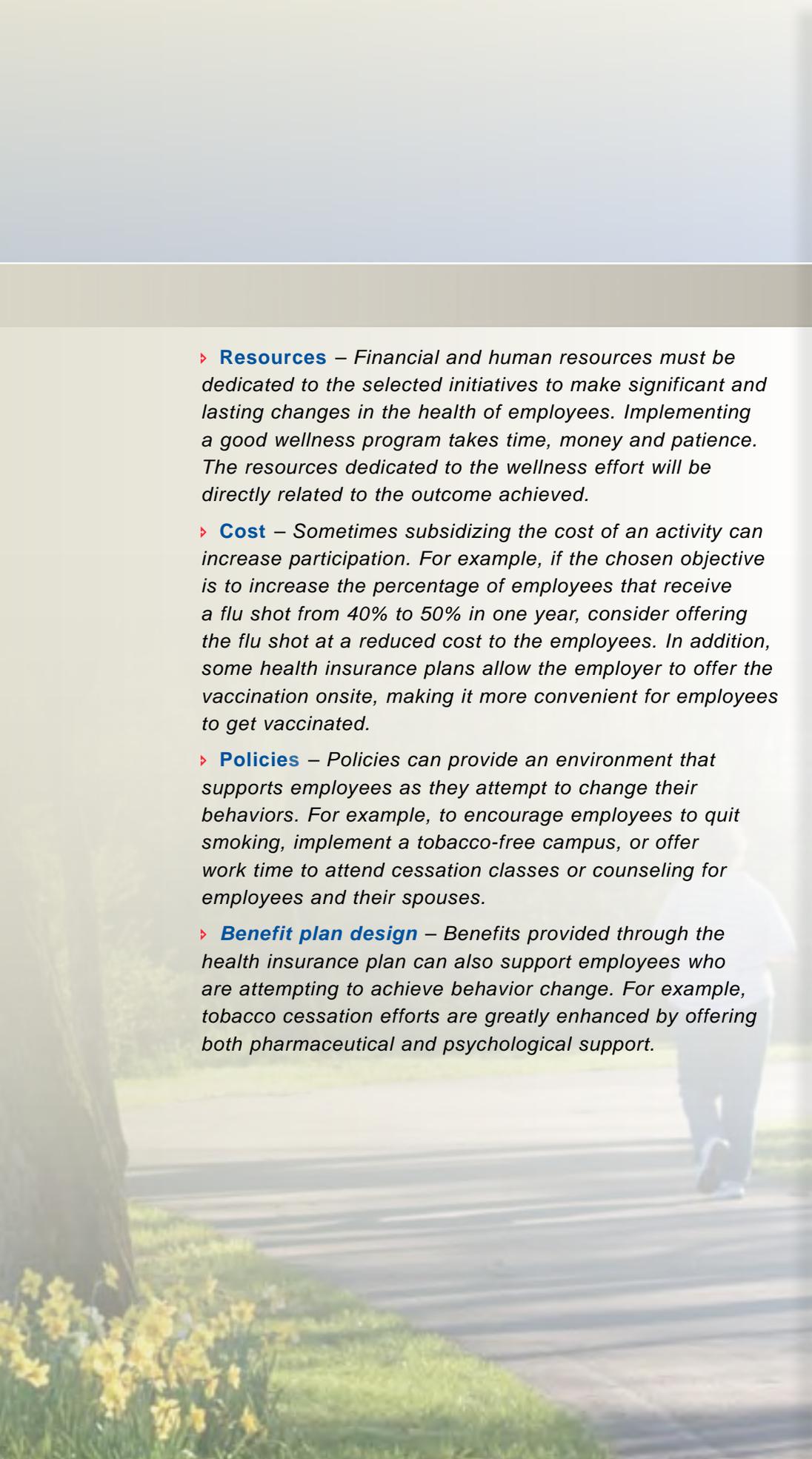
CREATE A WELLNESS PLAN

Read more about the [stages of change](#) and how to reach employees in each stage.

▶ *Achievable objectives*

When developing objectives, keep in mind that the resources dedicated to those objectives can impact how quickly they are achieved. Consider the factors listed below when setting objectives:

- ▶ **Difficulty** – *Certain behaviors are easier to change than others. For example, companies that implement an aggressive tobacco cessation and weight loss campaign can reasonably expect up to about a 3% change in one year. Other behaviors, such as utilization of preventive services (annual physicals, flu shots, dental cleanings, etc.), may improve more quickly, depending on the resources, cost, policies and benefits that are utilized to support the change.*
- ▶ **Readiness** – *Most people experience five “stages of change” as they work through changing a behavior. People can move through these stages in order, but may also move back and forth between stages as they encounter and overcome barriers before achieving permanent behavior change. In addition, people often attempt to change a behavior several times, moving through the stages again, before experiencing success. Some Health Risk Assessments include questions that will provide information about the stage of change that the majority of employees are currently at regarding specific health behaviors. If information about readiness is available, keep the stages in mind when developing objectives to minimize the chance that the program’s primary focus will be on a health issue that employees are not yet ready to change.*
- ▶ **Benchmarking** – *Some Health Risk Assessments allow comparison of results with like-industry companies, state data or national data. This feature is especially helpful for organizations that have never provided a Health Risk Assessment before, since it provides a way to “benchmark” results against other organizations and focuses attention on priority areas in which the organization is below average.*

- 
- ▶ **Resources** – Financial and human resources must be dedicated to the selected initiatives to make significant and lasting changes in the health of employees. Implementing a good wellness program takes time, money and patience. The resources dedicated to the wellness effort will be directly related to the outcome achieved.
 - ▶ **Cost** – Sometimes subsidizing the cost of an activity can increase participation. For example, if the chosen objective is to increase the percentage of employees that receive a flu shot from 40% to 50% in one year, consider offering the flu shot at a reduced cost to the employees. In addition, some health insurance plans allow the employer to offer the vaccination onsite, making it more convenient for employees to get vaccinated.
 - ▶ **Policies** – Policies can provide an environment that supports employees as they attempt to change their behaviors. For example, to encourage employees to quit smoking, implement a tobacco-free campus, or offer work time to attend cessation classes or counseling for employees and their spouses.
 - ▶ **Benefit plan design** – Benefits provided through the health insurance plan can also support employees who are attempting to achieve behavior change. For example, tobacco cessation efforts are greatly enhanced by offering both pharmaceutical and psychological support.

“It’s easy to throw a wellness program or initiative out and hope it works. At [Cabela’s](#), we develop the wellness program, get leadership support, educate those leaders, and work through our different management levels. The key is that when we plan a program, it considers all of the different steps of the worksite wellness model.”

– Brian Neppl, Wellness Manager, Cabela’s, Sidney, Nebraska



STEP 3: CREATE A WELLNESS PLAN

Nebraska Case Study

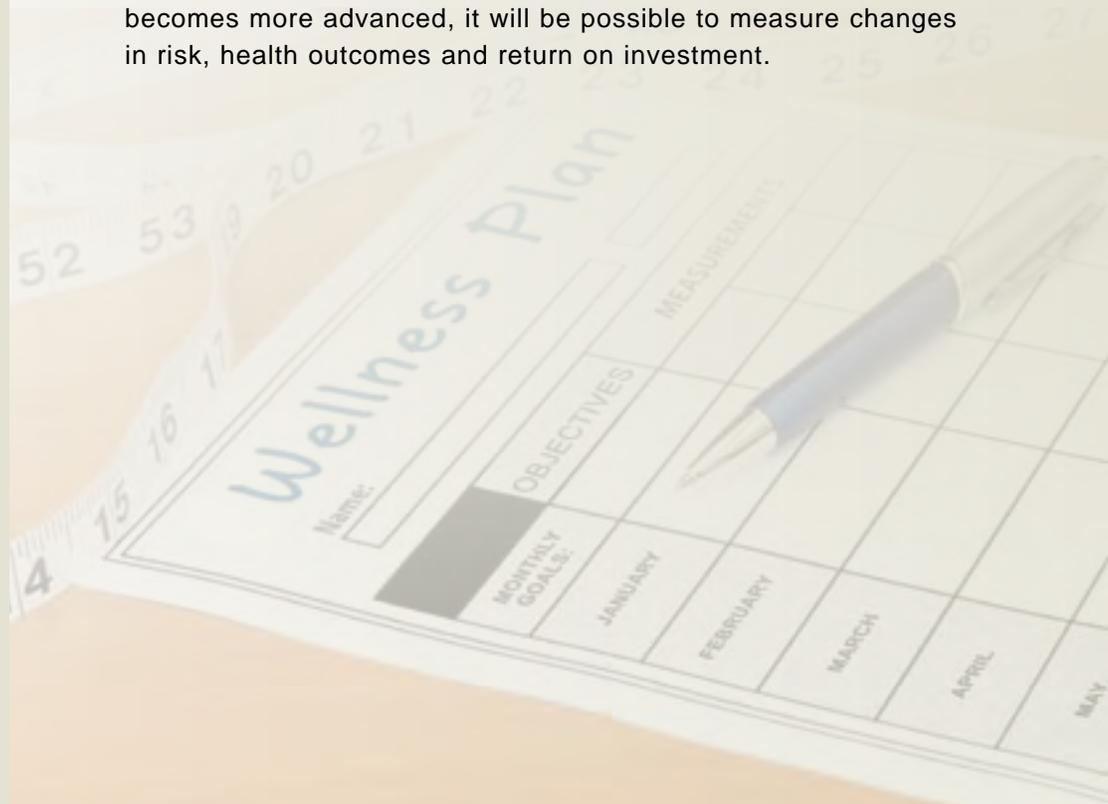
Health Risk Assessment results from [Mary Lanning Healthcare](#) in Hastings, showed that 35% of employees were exercising at least 3 days per week, and 52% wanted to start an exercise program in the next six months. With an objective of increasing the percentage of employees exercising each week, they offered the "Healthy Me" program, in which employees set a goal for each of the five areas of wellbeing: career, social, financial, physical, and community and had the opportunity to meet with a coach. They found that the percentage of employees exercising at least 3 days per week increased from 35% to 46%.

▶ Determine methods to measure outcomes

When developing the wellness plan, keep in mind what baseline data are available, and how to measure anticipated changes so the effectiveness of the program can be determined. It may help to think about these questions when planning:

- ▶ *What is the objective?*
- ▶ *Is the objective measurable?*
- ▶ *Does the organization have the capability to evaluate the program?*
- ▶ *What is necessary to put in place before the program begins in order to be able to measure outcomes?*

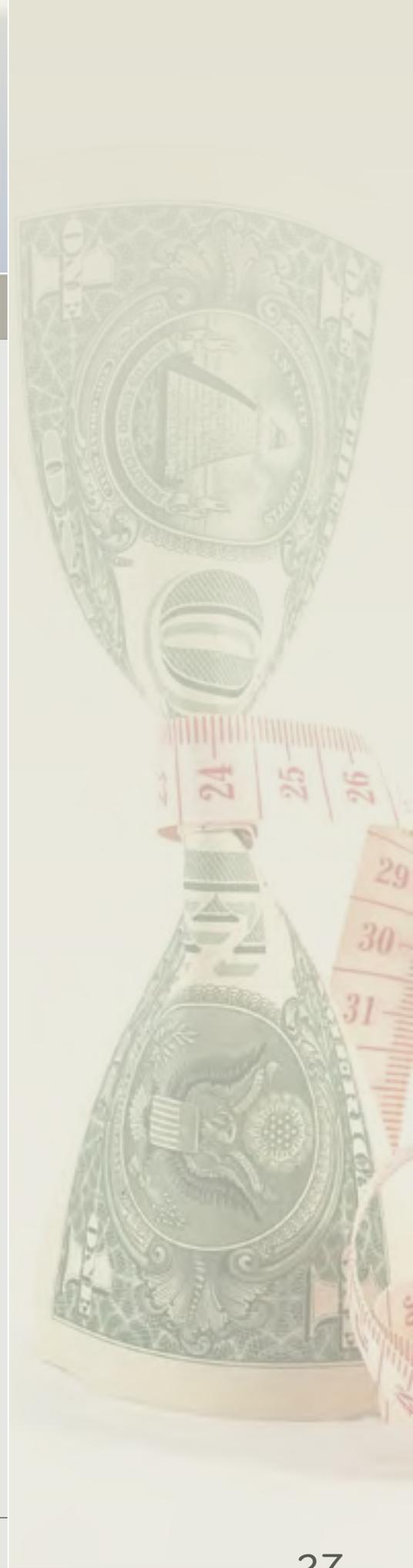
At a minimum, measure the participation in each of the activities that are offered as part of the wellness program, and attempt to measure change in knowledge or behavior as a result of the activities. Consider tracking changes in policies, benefits and the worksite environment as a result of the program. As the program becomes more advanced, it will be possible to measure changes in risk, health outcomes and return on investment.



3. Build a wellness budget

When establishing a new wellness program, it is common to begin with a limited budget that may increase with proven success. If possible, try to develop the budget based on the objectives and employees' needs so that the program can incorporate the elements that will make it successful. The budget should include items like printing, materials, Health Risk Assessments, health screenings, staff time, release time for employee participation, incentives and evaluation costs. An accurate, comprehensive budget will allow the wellness committee to weigh program costs against program outcomes during evaluation.

Like all investments, the benefits the organization receives will be proportional to the initial amount invested. Programs that require moderate investments are more likely to achieve cost-savings than low-budget programs. The budget should be adjusted based on the amount and types of resources available in the organization. Most middle level budgets hover around \$150 per employee per year, while organizations with nationally-recognized wellness programs may dedicate more than \$1000 per employee per year. On the other end of the spectrum, some small businesses and non-profit organizations offer worksite wellness programs with no official budget, but rather depend on employee contributions and donations from community organizations to fund their programs. Be creative when looking for ways to financially support wellness efforts. Perhaps the company already offers a wellness-related benefit or incentive to employees. The cost to the organization if each employee were to take advantage of that benefit can serve as seed money for the wellness program.





STEP 3:

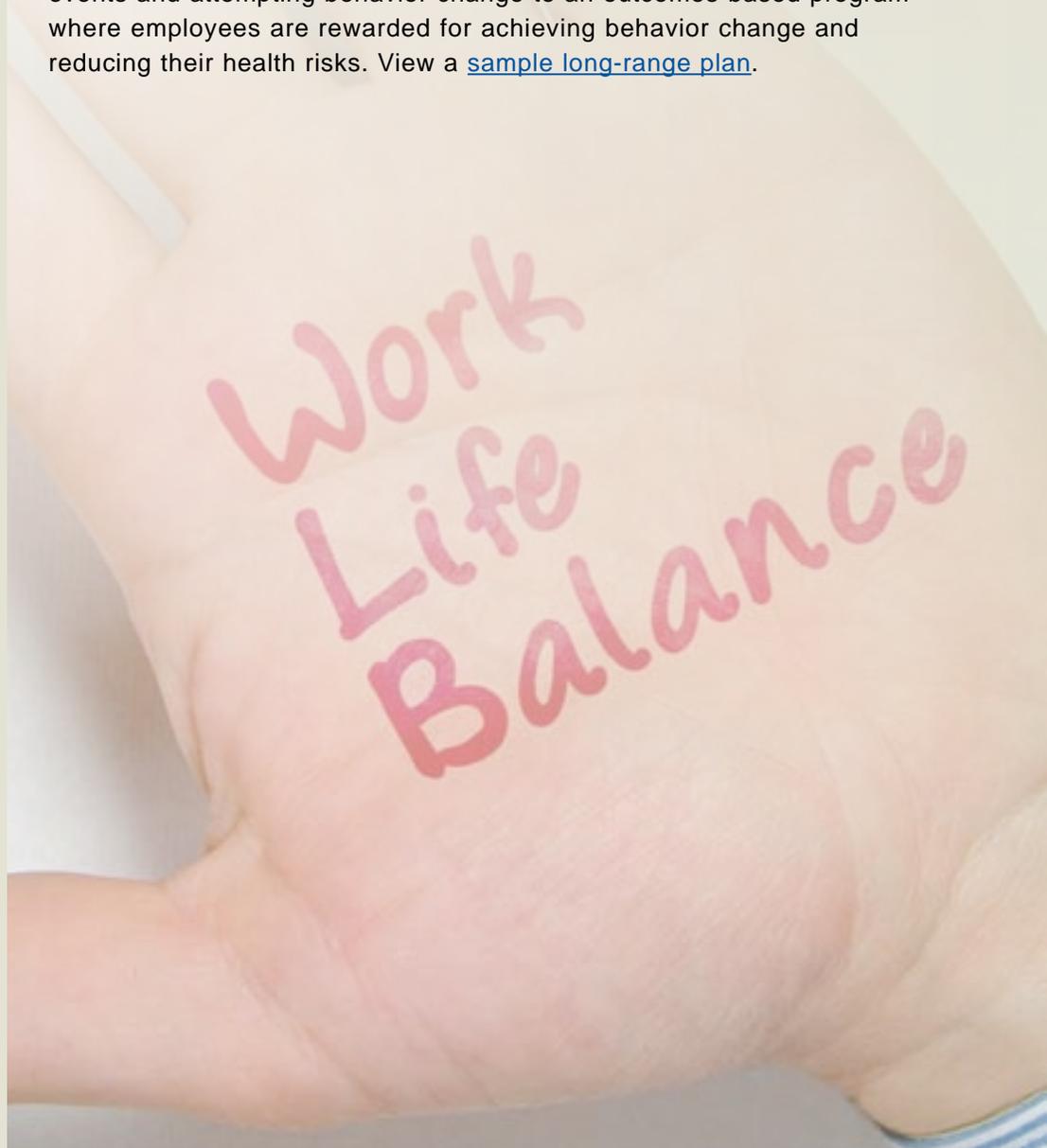
CREATE A WELLNESS PLAN

4. Draft a long-range plan

Vision statement

You may also choose to develop a vision statement for your program outlining where you want to be and answering the question, "Why are we here?" by listing where you see the program some years from now. Like the mission statement, the vision statement should connect with the organization's strategy.

It may be overwhelming if there are several areas that the wellness committee and/or the leadership would like to address through the program. Creating a long-range plan based on outcome objectives will allow for the achievement of small successes while moving toward a larger goal. For many organizations, a long-range plan will include transitioning the wellness program from a participation-based program in which employees are rewarded for participating in wellness program events and attempting behavior change to an outcomes-based program where employees are rewarded for achieving behavior change and reducing their health risks. View a [sample long-range plan](#).



Create a Wellness Plan Checklist -

- Created a mission statement

COMMENTS: _____

- Developed a written wellness plan

- Used data to identify 1 to 3 priority areas
- Created measurable objectives to address priority areas
- Determined methods to measure outcomes

COMMENTS: _____

- Created a wellness budget

COMMENTS: _____

- Created a long-range plan

COMMENTS: _____

Sample Vision Statements:

To make a positive difference in the lives of our workforce and benefit [State Farm](#) by improving results in health care costs, absenteeism and employee engagement through a Culture of Wellness.

- State Farm,
Lincoln, Nebraska

[Talent Plus](#) strives to be a leader in facilitating good health within our Talent Plus family and community. It is important to associates that Talent Plus is known for its commitment to creating healthy lifestyles through listening to people's needs, building supportive relationships and employing a holistic approach to health.

- Talent Plus,
Lincoln, Nebraska



STEP 4:

IMPLEMENT THE PLAN

STEP 4 Action Items

1. Select and implement programming to meet objectives
2. Offer policy and/or benefit options that support wellness

When selecting activities, make sure they align with the needs and interests of your employees, using the data you have collected as the basis for choosing the most appropriate activities.

Special considerations for small businesses

Small businesses have an advantage because communication can be much easier when there are fewer employees through word of mouth.

Once the objectives for the wellness program have been developed, the next step is to choose the activities that will help achieve them. Activities will fall into one of three strategies:

- ▶ *Programming*
- ▶ *Policies*
- ▶ *Benefits*

Addressing a health behavior through a combination of strategies versus a single strategy leads to a greater effect on the behavior.

Communication

Communication is an essential aspect for successful implementation of any chosen strategy or activity. Employees must be aware of the activities that the wellness program includes in order to participate, so frequently communicate about upcoming wellness opportunities through a variety of methods. When moving forward with the wellness program, satisfied participants can be a great way to advertise the program as they share their experiences with their coworkers.

1. Select and implement programming

Wellness programs that incorporate all three levels of programming—awareness, education and interventions—tend to be more successful than programs that only address one or two levels, because multi-level programs support the natural process of behavior change. However, workplaces that are just beginning to implement wellness may want to start with awareness and/or education activities to build momentum before moving on to interventions.

▶ **Awareness** – Promotes wellness by making employees more aware of their behaviors and ways to improve their health.

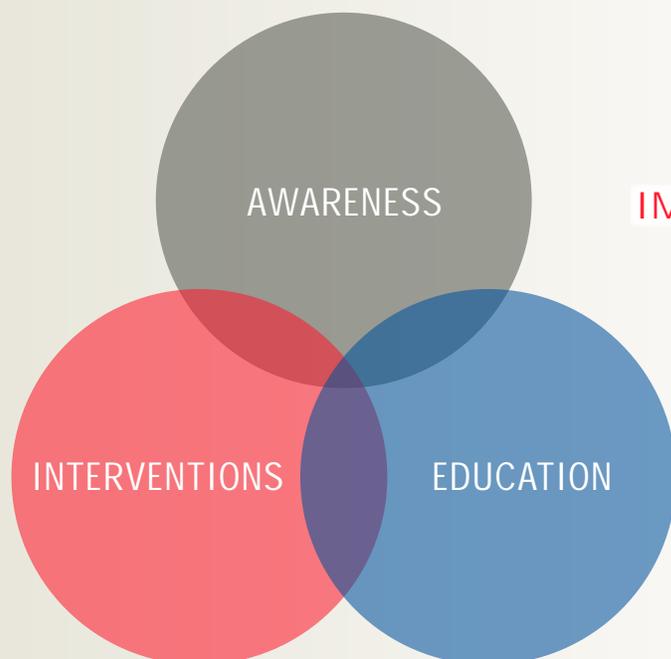
Examples include: Distribution of printed materials, lunch and learns, health fairs, etc. Health Risk Assessments and health screenings also raise awareness while delivering important data.

▶ **Education** – Provides opportunities for employees to learn more about specific wellness topics of interest.

Examples include: educational classes, webinars, etc.

▶ **Interventions** – Encourages employees to make and maintain positive behavior change.

Examples include: tobacco cessation, on-sight weight management, ongoing wellness incentive scorecard, etc.



IMPLEMENT

Programs that address attitude, skill building, self-management, and social support can improve employee participation and foster long-term change by positively impacting organizational culture. These elements can be built into any of the three levels of programming.

Remember to keep activities interesting, engaging and fun.



STEP 4:

IMPLEMENT THE PLAN

Special considerations for small businesses

Start with activities that can impact a large number of your employees to build support for your wellness program, such as a healthy recipe exchange potluck or a walk during the lunch break.

"Wellness is something we do with and for team members . . . It's not something we do to them."

– Tonya Vyhldal,
[WorkWell](#) Program Director
Lincoln, Nebraska

Considerations when selecting programming

- ▶ **Know the Employees** – When considering interventions to implement, keep the demographic characteristics of the employees in mind. The average age, gender and education level of employees in the organization should influence the interventions selected. For example, an organization with mainly women in their 50s may include walking groups and weight loss support groups, while an organization consisting of mostly men in their 20s and 30s might want to offer a fitness challenge or competition between departments. In addition, common barriers to participation such as child care needs, shift work, break time and cost to employee should be addressed when possible.
- ▶ **Diversification of Delivery** – Due to different preferred methods for learning, some programming options will work for some employees, while other options will be more effective for others. Therefore, it is important to diversify the delivery of the wellness initiative by providing various opportunities for building awareness, education and behavior change. Independent learners may prefer printed information, self-study materials, web-based programs, or self-administered programs. More participatory learners may benefit more from lunch and learns, personal coaching (which can be offered by telephone, online, or in person), or support groups. Other employees may benefit from experiencing the impact of policy changes before deciding to make a change in their own lifestyle.
- ▶ **Other Factors** - Other factors to consider when selecting interventions include: potential impact on multiple health risk factors, budget restrictions, time restrictions, and management expectations for the program.

View a list of topic-specific [programming](#) and [resources](#) available at the state and national levels.

Programming ideas

The table below provides examples of programming based on the amount of resources available to dedicate to wellness efforts:

LOW RESOURCE (Awareness / Education)	MEDIUM RESOURCE (Awareness / Education)	HIGH RESOURCE (Behavior Change)
<ul style="list-style-type: none"> <input type="checkbox"/> Largely paper-based program <input type="checkbox"/> Monthly newsletter <input type="checkbox"/> Posters promoting health <input type="checkbox"/> Health information pamphlets 	<ul style="list-style-type: none"> <input type="checkbox"/> Health fair as a program kick-off <input type="checkbox"/> Preventive wellness screenings <input type="checkbox"/> Confidential Health Risk Assessments <input type="checkbox"/> Lunch and Learns 	<ul style="list-style-type: none"> <input type="checkbox"/> Health care coverage for prevention and rehabilitation of chronic disease <input type="checkbox"/> Weight management, nutrition, and physical activity counseling as a member benefit in health insurance plan <input type="checkbox"/> On site fitness opportunities, like group classes or personal training

When choosing programming, consider partnering with other organizations to offer activities to employees. Local health departments, hospitals, health clubs and colleges may be able to provide certain interventions such as screenings, classes and incentive campaigns. The local county extension office and local chapters of service agencies such as the American Cancer Society, March of Dimes and the American Heart Association can be great resources as well. In addition, coworkers may already have knowledge about specific health issues or experience with specific activities that they are willing to share with other employees. Finally, the local wellness council [WorkWell](#), [WELCOM](#), and the [Panhandle Worksite Wellness Council](#) offers many services and resources, including consultation regarding all aspects of a wellness program.



STEP 4:

IMPLEMENT THE PLAN

Increasing participation

Organizations that have already been implementing a wellness program should strive to achieve an overall participation level of at least 70%. Accomplish this goal by making an effort to provide key components of the program to groups of employees that may be more difficult to reach, such as:

- ▶ Part-time and non-benefit eligible employees
- ▶ English as a second language employees
- ▶ Physically and/or mentally challenged employees

Another option is to motivate spouses, family members and retirees (especially if they are covered by the benefit plan) to participate as a way to encourage support for employees' health while they are at home.

Using incentives

Offering rewards for healthy behaviors demonstrates an organizational commitment to wellness. Incentives can motivate individuals to participate by creating interest in the wellness program. Providing incentives can also improve completion of or attendance at program activities and help individuals change or adhere to healthy behaviors.

Many organizations provide incentives for participating in specific or important program activities (such as a Health Risk Assessment or health screening). In the first few years of the wellness program, offer incentives for participation in other program activities as well, such as providing lunch for attendees at a "lunch and learn" educational session instead of asking employees to bring their own lunch. Many advanced wellness programs provide incentives when employees meet specific goals or maintain a healthy behavior. These types of programs are "results-based" or "outcomes-based," rather than "participation-based" programs in which employees receive incentives for participating in activities regardless of their results.

When offering incentives, try to avoid rewarding individuals for being the "best" or doing the "most." This strategy may promote excessive behavior, discourage those who are most likely to benefit from participating and can create elitism. The best designed incentive programs are based on goals that are attainable by most individuals, and allow all participants who achieve the goals to receive an incentive.

Remember that incentives do not have to cost the organization a great deal of money. Recognition, acknowledgment from upper management, and special privileges are examples of excellent intangible or low-cost incentives that can be provided within a limited budget. Once the leadership has determined what can be provided in terms of incentives, utilizing employee input in the process of selecting specific incentives can help avoid wasted time, money and effort.

If you already provide incentives for employees who reach specific goals, you may want to reevaluate the criteria for employees to earn incentives each year. This will continually challenge them to improve their health, leading to additional reductions in unhealthy behaviors.

Specific incentive ideas include:

FREE OR LOW COST	MODERATE COST	HIGH COST
<input type="checkbox"/> Certificates <input type="checkbox"/> Public recognition in employee newsletter or at company events <input type="checkbox"/> Personal commendation from management <input type="checkbox"/> Special privileges (time off, casual days, designated parking spots, etc.) <input type="checkbox"/> Company-branded trinkets (mugs, water bottles, key chains, etc.) <input type="checkbox"/> Company-branded T-shirts or hats	<input type="checkbox"/> Entertainment tickets <input type="checkbox"/> Company-branded sweatshirts, gym bags or gym towels <input type="checkbox"/> Health and fitness magazines, books or videos <input type="checkbox"/> Cash or gift certificates <input type="checkbox"/> Healthy lunches	<input type="checkbox"/> Health insurance premium discounts or lower deductibles <input type="checkbox"/> Contributions to a Healthcare Spending Account (HSA) <input type="checkbox"/> Travel opportunities (weekend getaways, cruises, flights) <input type="checkbox"/> Home fitness equipment <input type="checkbox"/> Health club memberships



STEP 4:

IMPLEMENT THE PLAN

2. Offer policies and benefits that support wellness

Special considerations for small businesses

Smaller businesses typically have an easier time creating a supportive environment than larger businesses. For example, policies can usually be changed more quickly in small businesses due to a lack of barriers compared to larger organizations. If your small business does not already have formal policies in place, implement informal policies to initiate a cultural shift towards wellness.

To get started, offer one or two policies or benefit options that support wellness. If you are able, offer group health insurance to your employees. If insurance is difficult for your company to provide, a health insurance subsidy is recommended as an alternative.

Educational materials, activities and challenges create awareness and help generate interest in behavior change. However, the implementation of policies and benefits to create an environment that supports healthy behaviors are what help sustain those changes over time. In addition, these types of changes have the ability to reach and impact all employees, potentially providing a greater return on investment than individual-focused activities.

Policies

Policies that support wellness can lead to healthy reactions to the psychological and physical demands of daily living and help improve overall outlook on life. A policy can be a written rule or simply a common practice and can be either informal or formal.

- ▶ *Informal policies may or may not be written but are publicly supported and widely communicated to employees during staff meetings or other ongoing opportunities. Participation in and compliance with informal policies is voluntary. For example, an informal worksite policy could be to keep employees informed of opportunities to learn new skills that may help them live healthier lives in the workplace and at home.*
- ▶ *Formal written policies often result from successful informal policies. Formal policies are written rules or guidelines that outline a plan of action and are applicable to all employees. Examples of formal policies that support wellness are:*
 - *Tobacco-free campus policy*
 - *Provision of cessation classes and insurance discounts to support non-tobacco use*
 - *Flexible work hours to accommodate physical activity, annual checkups, etc.*
 - *Alcohol and drug policies such as pre-employment screening, substance abuse counseling and rehabilitation*
 - *“Don’t come to work sick” policy*

Benefits

Many advanced wellness programs have begun to link wellness to employee benefits. For example, to encourage participation in the wellness program, some organizations discount health insurance premiums for those who participate in specified wellness initiatives. Other companies have gone further, requiring improvement in health outcomes for employees to earn a premium discount. Other ways to design the employee benefit package to support wellness are to:

- ▶ *Reduce or eliminate co-pays for annual preventive screenings and exams.*
- ▶ *Provide pharmaceutical coverage for nicotine replacement therapy*
- ▶ *Lower co-pays for disease management drugs.*
- ▶ *Provide consumer-driven health accounts to engage employees in making responsible health choices.*

When considering these kinds of “value-based” benefit plan design offerings, choose benefits that have the ability to address the areas of greatest need as shown in the organization’s data. New benefits should include opportunities to reduce barriers to medical and/or prescription compliance or decrease medical costs (for example, by promoting self-care to reduce unnecessary emergency room use). Examine the current benefit plan for these or other wellness-promoting elements that are offered to employees. Then promote the benefits that the plan includes to maximize what the plan already provides.

[View a list of recommended policies, benefits and environmental changes that support wellness.](#)

If you already have a wellness program and are looking for additional strategies to continue to nurture an environment that supports wellness, consider the following ideas:

- ▶ New hires are introduced to the wellness program at employee orientation.
- ▶ Supervisors support and enforce policy.
- ▶ Supervisors encourage and reward employees for engaging in the wellness program.
- ▶ Supervisors allow flex time to support healthy lifestyles and/or allow participation in wellness programs on company time.
- ▶ Supervisors are visible and actively participate in the corporate wellness program.
- ▶ Wellness becomes the norm and not the exception in all aspects of business.



STEP 4: IMPLEMENT THE PLAN

Nebraska Case Study

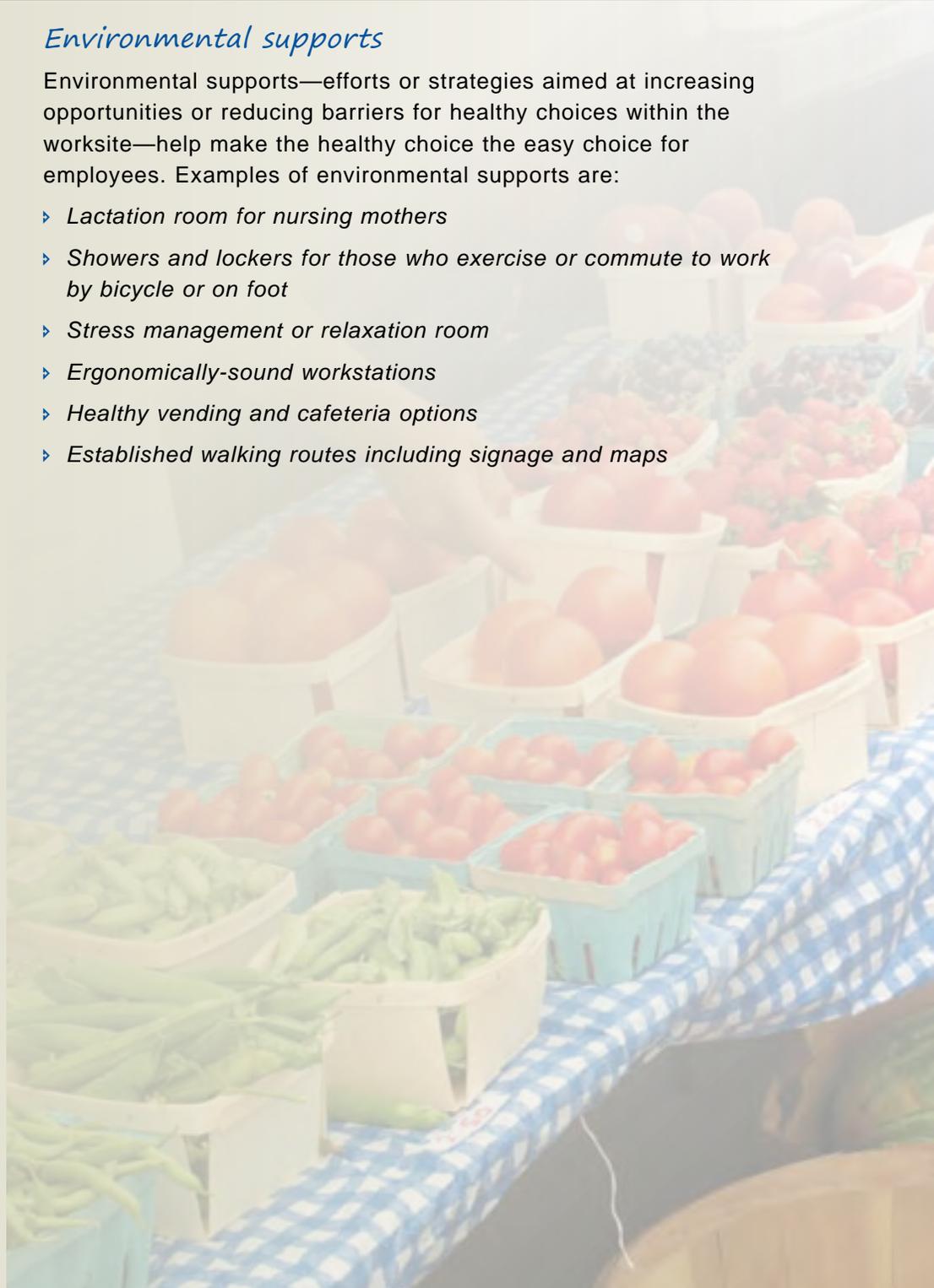
At [Box Butte General Hospital](#) in Alliance, the “Eat Right Menu Campaign” was initiated to market and promote the existing menu of lighter foods that are more nutritious and healthier than other cafeteria food options. “Eat Right” stickers were also posted on healthier options in the vending machines, salad bar, and the carry out server. In addition, “Wellness Bingo Black Out” was implemented to encourage and incentivize employees to utilize the “Eat Right” menu and labeled foods.

These activities raised awareness of what employees were eating and provided information about healthy choices. They learned that making healthy choices the “easy choice” for employees encouraged them to start eating healthier more frequently.

Environmental supports

Environmental supports—efforts or strategies aimed at increasing opportunities or reducing barriers for healthy choices within the worksite—help make the healthy choice the easy choice for employees. Examples of environmental supports are:

- ▶ *Lactation room for nursing mothers*
- ▶ *Showers and lockers for those who exercise or commute to work by bicycle or on foot*
- ▶ *Stress management or relaxation room*
- ▶ *Ergonomically-sound workstations*
- ▶ *Healthy vending and cafeteria options*
- ▶ *Established walking routes including signage and maps*



"It's one of the best benefits we can give to our employees and to our own future. It just makes sense."

– Harold Krueger, CEO
[Chadron Community Hospital](#)

Implement the Plan Checklist -

- Selected and implemented programming to meet objectives

COMMENTS: _____

- Offered policy and/or benefit options that support wellness

COMMENTS: _____





STEP 5:

EVALUATE THE PROGRAM

STEP 5 Action Items

1. Evaluate the process
2. Measure outcomes
3. Communicate the results

Focus on what you need to know: information that will help you determine the effectiveness of your current program and improve your program in the future.

Consider partnering with other organizations for evaluation, such as local universities, hospitals, etc.

Evaluating the program will provide a clear indication of whether or not the program's goals and objectives have been accomplished. It can also illustrate how the program can be modified or adapted to better meet employees' needs and increase the program's potential for success. Evaluation results describe if the program has helped to change the attitudes, behaviors, and health risks of employees. Providing good evidence of the program's effectiveness can help:

- ▶ *Legitimize the program*
- ▶ *Earn additional support from management and employees*
- ▶ *Ensure program sustainability*
- ▶ *Leverage future funding*

Evaluation methods and timing

There are many methods available to collect information that will help to evaluate the program's components and impact. The specific method used should be based on the program's objectives and resources. When possible, use standardized methods to collect information, which will allow objective measurement of change over time. These methods include surveys, web-tracking, tracking forms and records and analyzing policies. Other methods that provide helpful information include direct observation, focus groups, interviews, analysis of audio/photographs/videos and diaries. These methods can be more time-intensive and are subjective, but can provide information that standardized methods are not able to capture.

Another important component of evaluation is determining when information should be collected. Some elements of the program should be evaluated on an ongoing basis, such as participation and satisfaction. Other aspects can be evaluated on an annual basis or every other year, such as Health Risk Assessments, health screenings, productivity assessments, health care claims and organizational culture.

Measuring both the process and the outcomes allows you to evaluate the success of different elements of your program, providing a complete picture of the program's impact.

1. Evaluate the process

Evaluating the process relies on feedback from employees and leadership about the acceptance of the wellness program. The purpose is to assess whether the elements of the program were completed as intended. If results suggest that program objectives were not met, evaluating the process can help determine which program component was not implemented as expected and the reasons why.

Opportunities offered

Evaluate opportunities offered by keeping track of the number of brochures that were distributed, the number of newsletters sent or read, hits on the wellness program website, or the number of posters around the worksite. Or use internal documents and records to track the number of health fairs, educational classes, seminars, lunch-and-learns or health screenings that took place.

Participation

Participation is an important step in determining the effectiveness of the program, as it is difficult to help employees who are not taking advantage of the activities provided. Measure participation rates in program activities (lunch-and-learns, programs, challenges, etc.) by comparing the number of employees invited versus those that participated, by tracking the number of visits to the wellness program's page on the company website, or by pulling a report from your interactive wellness platform.

Satisfaction

Employee satisfaction or other feedback is important when considering how to improve the program. Use focus groups, email questionnaires, paper surveys or simple conversations to assess satisfaction. Also, take this opportunity to ask non-participants why they are not choosing to participate and/or what program changes might motivate them to participate.

Policy, benefit, and environment changes

The presence (or absence) of these changes is an important measure of the future success of the wellness program, as they provide the support necessary for employees to sustain positive changes in their health habits. To assess these changes, compare a list of policies, benefits or environmental supports from the initial data collection with later assessments after implementing the program for a year or two.

EVALUATE





STEP 5:

EVALUATE THE PROGRAM

2. Measure outcomes

Typically, the best sources of outcome data are your Health Risk Assessment and/or health screening results, but you can also implement quizzes and short surveys to help you evaluate the outcomes of your wellness program.

The purpose of outcome evaluation is to assess changes in attitudes, behaviors (both short term and sustained over time), and health risks. It can be more difficult to perform outcome evaluation than process evaluation since the results can take longer to compile, but the information gathered from this type of evaluation is extremely valuable. Outcome evaluation relies on the presence of baseline data for a well-defined group of people to compare with data gathered after implementing the program.

Change in attitude

Changes in attitude may be observed as the culture of the organization becomes more wellness-oriented. These improvements can be assessed by utilizing a Health Risk Assessment or other survey.

Change in knowledge

Increased knowledge about health-promoting behaviors, the consequences of unhealthy behaviors, and health conditions is a step in the right direction for employees as they work through the process of changing their lifestyles. When providing educational materials or sessions such as lunch-and-learns, use pre- and post-quizzes or surveys to determine the effectiveness of these activities.

Change in behavior

Health Risk Assessment data or observation of behaviors can be used to measure changes in behavior. Examples include counting the number of employees walking during breaks or the number of employees who choose the healthy option provided at company meetings. Another option is to work with providers such as vending machine companies, weight loss instructors or others to track changes in behavior over time.

Change in risk levels

Health Risk Assessment or health screening results may identify individuals who are at high risk for developing chronic diseases. A comparison of the results of these assessments year after year may demonstrate that the wellness program helps high-risk employees to lower their risk and supports low-risk individuals to prevent them from becoming high-risk.

Special Considerations for Small Businesses

Absenteeism can impact and cost a small business a great deal in lost productivity. It is easy to evaluate if your company tracks sick leave by comparing sick leave taken by participants and non-participants in the wellness program.

For example, if you offer a free flu shot to your 100 employees, you could compare the absenteeism during the flu season of the 42 employees who received the flu shot and the 58 who did not. If the employees that received the flu shot were absent an average of two fewer days per year than the employees that did not receive the flu shot, then you could calculate ROI based on the cost of sick leave.

Alternatively, if you offer a time-bank as a benefit to your employees, you can use self-report to measure absenteeism savings. Another method to assess absenteeism could be to compare leave taken by smokers versus non-smokers. You could then calculate the savings incurred when an employee stops using tobacco.

Change in health outcomes

Health screening results can measure changes in cholesterol, blood pressure, body mass index (BMI) and other health outcomes. Remember that it is not appropriate to identify or release individual employee information when conducting health assessments. Therefore, results from everyone who participates will be provided in aggregate form, and only changes that occur within the group can be observed. Or, a reduction in the number of employees who are diagnosed with specific diseases, including short-term illnesses like the common cold or influenza, as well as chronic diseases like diabetes and heart disease may be observed through health insurance claims.

Absenteeism

If baseline absenteeism data was collected, the program can be evaluated by measuring absenteeism again or comparing different groups of employees, such as those who participated compared to those who did not.

Productivity

If baseline productivity data was collected, measure productivity again—using the same method(s)—to assess any improvements resulting from wellness efforts.

Return on investment

With careful planning, an important outcome for any wellness program can be measured: return on investment (ROI). While it is fairly easy to calculate the costs associated with a wellness program, it is more difficult to quantify the savings. Wellness can have positive effects on many employee-related costs. In addition, often an expense in one area can lead to a savings in another area, such as a reduction in emergency room visits following the implementation of a self-care program. By working with human resources and benefits staff within the organization, it may be possible to track changes in health insurance and workers compensation claims as a result of implementing the wellness program. Another option is to measure changes in absenteeism and productivity by comparing participants in the program versus employees who do not participate to determine ROI. In addition, there are several published [ROI calculator tools](#) available online that will estimate ROI for wellness programs.



STEP 5: EVALUATE THE PROGRAM

3. Communicate the results

Nebraska Case Study

After evaluating findings from previous years, [Gallup](#), in Omaha, knew that they already had many active associates but still had about 40% of employees who were typically inactive. To offer something for everyone, they fused elements of social and physical well-being by hosting an event that allowed employees to either walk on a 2-mile route or a separate 5K course including distractions such as a costume contest, social stop, conversation, music and recognition. The active employees got a chance to compete and push hard. Meanwhile, the opportunity for the less active employees to have fun and exercise was a great success, with some employees training to jog the course and even bringing friends to the event.

After completing the evaluation, compile the results into a brief report to share with leadership and employees, highlighting progress towards reaching the goals outlined in the wellness plan. The evidence-based process for worksite wellness is cyclical: Once there is sufficient leadership support for a program, the steps outlined in this booklet should be followed on a regular basis, so the results gained from evaluation can be used to improve upon the wellness program and achieve even greater results in the future.

Evaluate the Program:

- Opportunities offered

COMMENTS: _____

- Participation

COMMENTS: _____

- Satisfaction

COMMENTS: _____

- Change in policies, benefits and environment

COMMENTS: _____

Measured Outcomes:

- Changes in attitude

COMMENTS: _____

- Changes in knowledge

COMMENTS: _____

- Changes in behavior

COMMENTS: _____

- Changes in risk

COMMENTS: _____

- Changes in health outcomes

COMMENTS: _____

- Absenteeism

COMMENTS: _____

- Productivity

COMMENTS: _____

- Return on investment

COMMENTS: _____

- Communicated the Results

COMMENTS: _____

"I am amazed at how worksite wellness has become a national pastime. There's a lot that we've got to learn and a lot of things that we've got to accomplish. It just says to me that we've come a long way but we've still got a long way to go. And it will be fun to see what happens in the next ten years."

- William M. Kizer, Sr., founder and inspiration for worksite wellness in America and the [Wellness Council of the Midlands](#), Omaha, Nebraska



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