Workforce Wellness Toolkit

Designed by the Northern California Center for Well-Being
101 Brookwood Ave Suite A, Santa Rosa,
CA 95401
P | 707.575.6043
F | 707.575.1060

www.norcalwellbeing.org

The toolkit can be found online at:
http://www.norcalwellbeing.org/community-programs/worksites/worksite-wellness

Funding for this project was made available through HEAL, a healthy eating active living community health initiative. HEAL is a project of the Community Activity & Nutrition Coalition of Sonoma County and is supported by Kaiser Permanente’s Healthy Eating Active Living Program.
# Table of Contents

**Introduction**  
2

**Workplace Wellness Checklist**  
3

**Financial Benefits**  
- Reducing Absenteeism  
- Managing Healthcare Costs  
- Return on Investment  
4
5
6

**Step 1 – Developing a Wellness Team/Team Tasks**  
7

**Step 2 – Assessment**  
9

**Step 3 – Wellness Goals & Objectives**  
11

**Step 4 – Policy Design**  
12
- Healthy Food Policy Examples  
13
- Health Awareness Policy Examples  
19
- Physical Activity Policy Examples  
24
- Smoke Free Workplace Policy Examples  
28
- Lactation Accommodation Policy Examples  
33

**Step 5 – Policy Implementation**  
38

**Step 6 – Program Design**  
39

**Step 7 – Program Implementation**  
40

**Step 8 – Employee Buy-in**  
41

**Step 9 – Maintain Adherence**  
43

**Additional Resources**  
44
INTRODUCTION + WORKFORCE WELLNESS CHECKLIST

RESOURCES INCLUDED IN THIS SECTION:

1. LOCAL WORKFORCE WELLNESS RESOURCES TO HELP YOU GET STARTED
Introduction

Every employer wants healthy and happy employees. Employees who are healthy are more productive, use health insurance appropriately, take less sick time, and feel good about themselves and their work. While the "bottom line" responsibility for taking care of health rests with the employee, the employer can choose to support employee wellness. This can be done by implementing policy changes within the company and starting an on-site wellness program.

YOU, the employer, can create a workplace that encourages a healthy lifestyle and helps employees acquire and maintain healthy habits. This toolkit provides the steps you need to reach these goals.

Get Started - Use these nine basic steps to implement a wellness policy and/or program:

**Step 1: Developing a Wellness Team**
**Step 2: Assessment**
**Step 3: Wellness Goals & Objectives**
**Step 4: Policy Design**
**Step 5: Policy Implementation**
**Step 6: Program Design**
**Step 7: Program Implementation**
**Step 8: Employee Buy-in**
**Step 9: Maintain Adherence**
Workforce Wellness Checklist

The following checklist can be used by employers to develop a comprehensive and effective worksite wellness program. Each section includes an estimated amount of time needed to complete each stage. Additionally, most of the activities include a reference to where information can be found on the worksite wellness toolkit located at http://norcalwellbeing.org/employee-wellness.php

Pre-Planning (1 month)
- Gain buy-in and support from CEO/senior management to develop an operating plan.

First Stage – Planning (1-3 months)
- Convene a wellness team or assign a wellness coordinator (Toolkit - Step 1)
- Conduct an assessment of the work environment (Toolkit - Step 2)
- Assess the interest and needs of corporate leaders and employees (Toolkit - Step 2)
- Develop an operating plan. Include the following:
  - Vision or mission statement for the wellness program that incorporates the organization’s mission or vision
  - Goals and objectives
  - Timeline
  - Roles and responsibilities
  - Itemized budget
  - An in-house marketing strategy
  - Evaluation procedures
- Present proposed operating plan to CEO/senior management in order to gain buy-in and support for stage two

Second Stage – Development (1-3 months)
- Collect baseline return on investment (ROI) data (i.e. sick days, disability claims and costs, healthcare costs, workers compensation claims and costs)
- Develop goals and objectives (Toolkit - Step 3)
- Design policies (Toolkit – Step 4)
- Design program(s) (Toolkit – Step 6)
- Select incentives (Toolkit – Step 8)
- Develop tools to evaluate policies and/or programs (Toolkit – Step 9)
- Acquire resources (Toolkit – RESOURCE PAGE)

Third Stage – Implementation (1 month)
- Implement the policies (Toolkit – Step 5)
- Market the program (Toolkit – Step 7)
- Gain employee buy-in (Toolkit – Step 8)
- Implement the program(s) (Toolkit – Step 8)

Fourth Stage – Evaluation (1 year after implementation)
- Evaluate the program (Toolkit – Step 9)
- Modify policies and programs, as needed, based on evaluation results
Local Workforce Wellness Resources to Help You Get Started

The following free, low-cost, and cost-saving resources can help your business start or modify an employee wellness program:

<table>
<thead>
<tr>
<th>Resource Name</th>
<th>Description</th>
<th>Target Audience</th>
<th>Cost</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Free Online Workforce Wellness Toolkit</strong></td>
<td>Provides employers with steps to create a healthy workplace. Topics include: Creating a Wellness Team; Assessment tools; Wellness Goals &amp; Objectives; Policy Design &amp; implementation; Program Design &amp; implementation; Gaining Employee Buy-in; Evaluation &amp; Mentoring; The Financial Benefits; and Wellness Resources. <strong>Health Promotion Classes</strong> (Group Nutrition; Diabetes; Heart Health; Weight Management; Smoking Cessation).</td>
<td>Any employer</td>
<td>Free/ low-cost</td>
<td>(707) 575-6043 <a href="mailto:info@nccwb.org">info@nccwb.org</a></td>
</tr>
<tr>
<td><strong>iWALK</strong></td>
<td>A movement designed to make exercise a priority in Sonoma County. By becoming an iWALK Employer, you pledge to promote a culture of fitness in your workplace. iWALK provides the tools and incentives to start up your own program.</td>
<td>Any employer</td>
<td>Free</td>
<td><a href="mailto:info@iwalksonoma.org">info@iwalksonoma.org</a></td>
</tr>
<tr>
<td><strong>Work healthy. Live Healthy</strong></td>
<td>by St. Joseph Health's Workforce Health Initiative collaborates with employers to identify and address employee health risks before they result in costly healthcare claims and threaten quality of life for employees while also creating a healthier worksite and overall community. Program includes complimentary health information, lunch-n-learns, and wellness planning strategy coaching at no cost in addition to customized add-ons at a fee (i.e: flu shots or biometric health screening events).</td>
<td>Any employer. Any Size.</td>
<td>Free for most services</td>
<td>Teresa Scott Workforce Health Specialist T:(707)525-5300 x 318 <a href="mailto:Teresa.Scott@stjoe.or">Teresa.Scott@stjoe.or</a></td>
</tr>
<tr>
<td><strong>HealthWorks by Kaiser Permanente</strong></td>
<td>An overarching program of free and fee-based products and services that coordinates and leverages Kaiser Permanente’s diverse capabilities to provide employer-specific health promotion programs to improve employee health and maintain or increase productivity.</td>
<td>Employers with 51+ employees</td>
<td>Custom programs available to employers with 250+ employees</td>
<td>Free and fee-based. Pricing is dependent upon the program design or package.</td>
</tr>
<tr>
<td><strong>Live Well for Life by Sutter Health</strong></td>
<td>A best practice worksite wellness program recognized by the American College of Sports Medicine, 2009. LWFL offers health risk assessments, biometric/health screenings, onsite health education, group events and challenges, rewards tracking, online health</td>
<td>Employers with 100+ employees</td>
<td>Free and fee-based. Pricing is dependent upon the program design or package.</td>
<td>Elyssa Wasserberg (415) 828-9204 <a href="mailto:wassere2@sutterhealth.org">wassere2@sutterhealth.org</a></td>
</tr>
<tr>
<td>Website</td>
<td>Program</td>
<td>Eligibility</td>
<td>Cost</td>
<td>Contact</td>
</tr>
<tr>
<td>---------</td>
<td>---------</td>
<td>-------------</td>
<td>------</td>
<td>---------</td>
</tr>
<tr>
<td><a href="http://www.anthem.com">www.anthem.com</a></td>
<td><strong>360° Health by Anthem Blue Cross</strong> - Helps members become more informed and involved in their health and wellness. By providing a total health solution, members have a powerful combination of targeted programs, services and one-on-one professional support to help them adopt healthier behaviors that last.</td>
<td>Anthem Blue Cross members</td>
<td>Visit the website to request a quote</td>
<td>Contact your insurance broker</td>
</tr>
<tr>
<td><a href="https://www.blueshieldca.com/hw/">https://www.blueshieldca.com/hw/</a></td>
<td><strong>Health &amp; Wellness by Blue Shield of California</strong> - Web page provides information on preventive health, conditions and options for treatment. Members can access resources, including self-management programs, a comprehensive health library, and articles from Healthwise®.</td>
<td>Blue Shield members</td>
<td>Visit the website to request a quote</td>
<td>Contact your insurance broker</td>
</tr>
<tr>
<td><a href="http://www.mhn.com">www.mhn.com</a></td>
<td><strong>MHN a Health Net Company</strong>  Provides behavioral change solutions for individuals and organizations, including a wellness and lifestyle program with motivational coaching for weight management, tobacco cessation coaching, and stress management.</td>
<td>MHN members</td>
<td>Visit the website to request a quote</td>
<td>Contact your insurance broker</td>
</tr>
<tr>
<td><a href="http://www.westernhealth.com">www.westernhealth.com</a></td>
<td><strong>Western Health Advantage</strong> Helps members find balance and live healthier by promoting preventive health classes and gym discounts. As a member benefit, WHA partners with Healthyroads, a wellness and prevention company that provides lifestyle health coaching to assist members with healthy living. WHA also partners with Mercy Preventive Health to assist employers in creating a custom-made health and wellness program that supports personal efforts by employees to maintain a healthy lifestyle.</td>
<td>WHA members</td>
<td>Free and fee-based. Pricing is dependent upon the program design or health plan package.</td>
<td>Contact your insurance broker or WHA Sales at (916) 563-3198 or (888) 499-3198 toll-free.</td>
</tr>
</tbody>
</table>
FINANCIAL BENEFITS

RESOURCES INCLUDED IN THIS SECTION:

1. WORKSITE WELLNESS ROI EXAMPLE: SICK LEAVE
Financial Benefits

Wellness programs provide economic benefits by reducing absenteeism

Results from some of America’s finest companies show that investing in your most important asset - your employees - has an impact on your bottom line. Additionally, investing in your employees’ health is one of the best ways to reap financial benefits. For example:

- Fitness programs have reduced employer healthcare costs by 20% to 55%
- Reducing just one health risk increases a person’s productivity on the job by 9% and reduces absenteeism by 2%
- For every $1 the average company spends on its worksite wellness program, it receives an average net benefit of $3.40 to $7.88

From a management perspective, worksite wellness programs have the potential to reduce a variety of costs. Implementing a worksite wellness program therefore becomes an ideal way to create a healthier workforce while at the same time decreasing absenteeism, reducing medical claims costs, and improving employee productivity, recruitment, and retention.

Reducing Absenteeism

Several industry studies have shown reductions in absenteeism and disability time as a result of employee wellness programs. The reduction in absenteeism varies, but most organizations implementing wellness programs have seen improvement in this area.

Reduction in Absenteeism Statistics

- Studies at DuPont and General Mills found 14% - 19% reductions in absenteeism
- DuPont saw a total of 11,726 fewer net disability days
- General Electric reports an astounding 45% decrease in absenteeism
- Pacific Bell’s program decreased absent days 0.8% to save $2 million in one year
- Focusing health promotion efforts on high-risk employees can lead to better results. A national manufacturing company reports a decrease of 12.2% in illness days for these employees
- Prudential Insurance, disability days were 20% lower
Managing Healthcare Costs

Preventable illnesses make up 70% of illness costs in the United States, and studies show that 75% of health care costs are preventable. Because employees with the highest number of preventable “risk factors” cost 8 times more than low risk employees, it has become a goal of many companies to develop worksite wellness programs as a way of creating a healthier workforce.

Several industry studies have been successful at lowering medical and insurance costs for employees who participate in worksite wellness programs. Although the cost savings vary, it’s important to note that these programs, particularly programs involving exercise, benefit both the employee and the employer.

Managing Healthcare Costs Statistics

- **Bank of America**: For $30 per person, BofA conducted a health promotion program for retirees using a risk assessment questionnaire, self-care books and other mailed materials. **Insurance claims were reduced an average of $164 per year** in this group while they increased $15 for the control group. Since they were able to document significant changes in risk behavior, they anticipate greater savings in future years.

- **City of Mesa, Arizona**: With lower health care claims, medical costs decreased 16% for employees who participated in the comprehensive health promotion program. The city realized a **return of $3.60 for every dollar invested** in the health of city employees.

- **Coca Cola**: The company reported a reduction in health care claims with an exercise program alone, **saving $500 per employee per year** for the employees (60%) who joined their HealthWorks fitness program.

- **Pacific Bell**: FitWorks participants **claimed $300 less per case for a one-year savings of $700,000**. Savings for conditions related to a sedentary lifestyle are $722 per case.

- **Prudential Insurance Company**: The company’s major medical costs dropped from $574 to $312 for each participant in its wellness program, **annual medical costs fell by 46%**.

- **Steelcase**: Average medical costs of high-risk employees - those whose lifestyles include two to four health risks such as smoking, little exercise, overweight - are 75% higher than those of low-risk employees. But high-risk employees who improved their health habits through the company’s health promotion program and became low risk **cut their average medical claims in half** thus lowering their medical insurance costs by an average of $618 per year.

- **Superior Coffee and Foods**: The company showed 22% fewer admissions to a hospital, 29% shorter hospital stays, and 42% lower expenses per admission when comparing costs for this division’s 1,200 employees with costs for other divisions. **Long-term disability costs were down by 40%**.
Return on Investment

*For every $1 the average company spends on its worksite wellness program, it receives an average return on investment of $3.40 to $7.88.*" – The American Heart Association, 2007

Return on Investment (ROI) Statistics
The following company statistics show the reported return on investment (ROI) for every $1 invested in worksite health promotion programs.

- **DuPont Co:** (ROI: $1.42) Absences from illness unrelated to the job among 45,000 blue-collar workers dropped 14% at 41 industrial sites where the health promotion program was offered, compared with a 5.8% decline at 19 sites where it was not.

- **The Travelers Corporation:** (ROI: $3.40) The company claims a $3.40 return for every dollar invested in health promotion, yielding total corporate savings of $146 million in benefits costs. Sick leave was reduced 19% during the four-year study.

- **Reynolds Electrical & Engineering Company:** (ROI: $1.68) Their Stay Alive & Well program cost $76.24 per employee. Over half of the 1,600 employees participated; participants significantly lowered cholesterol levels, blood pressure, and weight and experienced 21% lower lifestyle-related claim costs than non-participants. Resulting savings: $127.89 per participant.

- **California County:** (ROI: $1.79) To prevent back injuries among its employees, a county in California targeted white- and blue-collar workers, offered classes and fitness training. As a result, there was a significant increase in employee morale, reduced worker’s comp claims, medical costs and sick days related to back injuries.

Additional companies who have seen a return on investment after implementing a worksite wellness program:

<table>
<thead>
<tr>
<th>ROI</th>
<th>Employers</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5.96</td>
<td>Bank of America (Fries)</td>
</tr>
<tr>
<td>$4.73</td>
<td>Bank of America (Leigh)</td>
</tr>
<tr>
<td>$4.47</td>
<td>Wisconsin School District Insurance Group</td>
</tr>
<tr>
<td>$3.50</td>
<td>General Mills</td>
</tr>
<tr>
<td>$3.10</td>
<td>PacBell</td>
</tr>
<tr>
<td>$2.90</td>
<td>Prudential Insurance</td>
</tr>
</tbody>
</table>
Worksite Wellness Return on Investment (ROI) Example: Sick Leave

Questions:
1. How many employees does your worksite have? __________
2. What is the average or typical earning (ballpark range) of an employee at your worksite? __________
3. Annually, how many hours of sick time are allocated per employee? __________

Assumptions (for this example):
1. Assume $50 worth of programs/prizes/incentives per participant per year if they have 100% success meeting their goals.
2. Assume 50% employee participation rate in a wellness program.
3. Assume program participants use 60% of their allocated sick time each year.

Sample Information:
1. My company has 10 employees (5 of which are participating in the wellness program)
2. The average pay at my company is $17 per hour.
3. My non-participating employees use approximately 85% of their allocated sick time each year (5 allotted sick days/40 hours).
4. My participating employees use approximately 60% of their allocated sick time each year (5 allotted sick days/40 hours).

Equations:
1. Multiply total allotted hours of sick time by percentage of time used by non-participating employees:

\[
\frac{40 \text{ hours}}{\text{(total allotted hours of sick time)}} \times \frac{0.85}{\text{(percentage of time used by non-participating employees)}} = \frac{34 \text{ hours}}{\text{(sick time used by non-participating employees)}}
\]

2. Multiply total allotted hours of sick time by percentage of time used by participating employees:

\[
\frac{40 \text{ hours}}{\text{(total allotted hours of sick time)}} \times \frac{0.60}{\text{(percentage of time used by participating employees)}} = \frac{24 \text{ hours}}{\text{(sick time used by participating employees)}}
\]
3. To determine the total hours of unused sick time by participating employees: multiply the difference in hours of sick time used by non-participating and participating employees times the number of participating employees:

\[
\frac{10 \text{ hours}}{\text{difference in hours used by non-participating and participating employees}} \times \frac{5}{\text{(# of participating employees)}} = \frac{50 \text{ hours}}{\text{total hours of unused sick time by participating employees}}
\]

4. To determine total savings through unused sick time by participating employees: multiply the total hours of unused sick time by participating employees by the average hourly rate:

\[
\frac{50 \text{ hours}}{\text{(total hours of unused sick time by participating employees)}} \times \frac{17 \text{ dollars}}{\text{(average hourly rate)}} = \frac{850 \text{ dollars}}{\text{(total savings through unused sick time by participating employees)}}
\]

5. To determine total program cost: multiply the number of participating employees by the cost per person if they are eligible for 100% of prizes/incentives:

\[
\frac{5}{\text{(# of participating employees)}} \times \frac{50 \text{ dollars}}{\text{(cost per person if they are eligible for 100% of prizes/incentives)}} = \frac{250 \text{ dollars}}{\text{(total program cost)}}
\]

6. To determine Total Savings: subtract total program cost from total savings for unused sick days:

\[
\frac{850 \text{ dollars}}{\text{(total savings through unused sick time)}} - \frac{250 \text{ dollars}}{\text{(total program cost)}} = \frac{600 \text{ dollars}}{\text{(Total Savings)}}
\]

7. To determine ROI on each dollar spent: divide Total Savings by the total program cost:

\[
\frac{600 \text{ dollars}}{\text{(Total Savings)}} \div \frac{250 \text{ dollars}}{\text{(total program cost)}} = \frac{2.40}{\text{(ROI on each dollar spent)}}
\]

8. To determine ROI per participant: divide Total Savings by the number of participants:

\[
\frac{600 \text{ dollars}}{\text{(Total Savings)}} \div 5 = \frac{120 \text{ dollars}}{\text{(ROI per participant)}}
\]
STEP 1 – DEVELOPING A WELLNESS TEAM
**STEP 1 – Developing a Wellness Team**

Create a Wellness Team

A wellness team should be developed when possible. Ideally, the team is made up of a handful of people from different areas of the company. This diversity guarantees that employees have a role in the process, which makes it more likely that they will support policies and/or programs. If you are a small business and are not able to assemble a wellness team, it is recommended that you assign a wellness coordinator to run the program.

**Essential Elements of a Good Wellness Team**

- **Leadership**: Identifying a team leader is important. The leader is someone who has the interest, skill, and time to take on the tasks required for the project. A good leader will have skills in the following areas: facilitation, conflict resolution, active listening, and communication.

- **Team Work**: Identifying employees who have an interest in worksite wellness is key. If they are excited about what they are working on, they will be more likely to rally around the project. It is also important to find people who work well together, even when there are disagreements.

- **Clarity**: Responsibilities and goals of the team need to be made clear from the owner or manager. Clarifying these goals will help the group in their planning process.

- **Regular Meetings**: The wellness team should meet regularly. This allows the group to plan, address problems, and follow-up on issues in order to keep the program running smoothly. Setting regular agenda items can also be useful to ensure that all areas of worksite wellness are addressed at meetings.

**Wellness Team Tasks**

- Develop an operating plan. The operating plan is a document that shows what the wellness program will accomplish. The plan is especially important in the event that a key member leaves the team. If this happens, the plan can be used to bring his or her replacement up to speed on the project.
  
  - A **vision or mission statement** for the wellness program that incorporates the organization’s mission or vision (The vision is a simple statement about what is seen for the future of the program)
  
  - **Specific goals and measurable objectives** that are linked to the company’s strategic priorities
Wellness Team Tasks (cont.)

- A timeline for implementing the plan
- Roles and responsibilities for completion of objectives
- An itemized budget that is sufficient to carry out the wellness plan
- Marketing strategies that will help promote the wellness policies and programs
- Evaluation procedures that will measure the stated goals and objectives

- Review existing policies that promote health and wellness. Determine if these policies need updating or revising. Conduct an assessment to determine which policies need to be added.
- Visit or read about companies that are recognized as “leaders” in the area of worksite wellness.
- Inform employees of new programs and polices. Use posters, newsletters, emails or other marketing techniques to inform your employees.
- Evaluate your policies and programs throughout the year. Modify policies and programs as needed.
Step 2 – Assessment

Resources included in this section:

1. Employee Interest Survey
2. Health Status Questionnaire
3. Worksite Health Access Survey
**Step 2 – Assessment**

It’s important to develop a good plan if your organization is going to create a wellness program that will contain costs and improve employee health. Assessments are some of the best tools for starting the planning process.

Assessments are data gathering tools that management or business owners can use to develop worksite wellness objectives, programs, and policies. Three of the most important assessments to consider are described below. We have provided samples of each assessment. They are user friendly and can be modified to suit your needs.

**Organizational Assessment**

Assessing your worksite allows you to take a look at your organization as a whole. By looking at the work environment, you can begin to identify opportunities for creating changes that will promote healthy choices among your employees. Some questions you might ask during the organizational assessment include the following:

- What facilities (i.e. gym, shower) are offered that could encourage physical activity?
- What parts of the building (i.e. stairs) and surrounding area (i.e. walking path) can be used to develop a wellness program?
- What food choices are available at the worksite (i.e. cafeteria, vending machines)?
- Who makes up your workforce (i.e. gender, age, ethnicity)? How would programs or policies be received by each of these groups?

Be sure to talk to your employees and management when completing this assessment. If the program will include other worksite locations, be sure to visit these locations and include them in the assessment as well.

**Employee Interest Assessment**

Employee interest assessments are a great tool to use when designing your program. They can lessen resistance employees might have by building employee ownership and support of a program. The assessment has three main purposes:

- Introduce employees to worksite wellness
- Get input from employees
- Help to launch a successful wellness program

Once you have found or developed a survey you want to distribute, set a date(s) for distribution. Promote the survey among employees to ensure a good response. For worksites with less than 100 employees, aim for 50-75% response rate. For worksites with 100 – 200
employees aim for 35-50% response rate. Also, employees will be curious to know the results of the survey. Be sure to keep them informed and let them know what you are planning. This will help build more interest in the programs and policies that will be developed.

Health Assessments

There are two types of health assessments available: health status questionnaires and health risk assessments. Both are great options for understanding your employee’s level of wellness. They also provide information on ways employees can improve individual health. Consider using this information to develop your worksite wellness policies or programs and motivate your employees to participate.

These assessments contain personal health information. Offer only confidential health status questionnaires or confidential health risk assessments through a third party such as:

- [Northern California Center for Well-Being](http://www.healthyworkplace.com)
- [WellSource](http://www.wellsourcer.com)

1. **A Health Status Questionnaire** measures individual health perception such as mental/emotional health, stress level, sense of control over one’s personal health and wellness, physical pain, and lifestyle choices. The Center for Well-Being recommends that employers distribute health status questionnaires, but maintain the employees’ confidentiality by using a third party to collect and tally the survey results. Another option is to use the survey as a tool to encourage employees to think about personal health habits, but not collect the data.

2. **A Health Risk Assessment** (or Health Risk Appraisal) is a tool that collects individual information such as medical history (blood pressure, cholesterol), family history (diabetes, heart disease), health behaviors (weekly physical activity, nutrition, substance use), and demographic information (ethnicity and gender). The Health Risk Assessment is central to health promotion programs. Using the Health Risk Assessment, you can discover risk levels, measure results, determine if a health intervention is needed, and decide what programs should be implemented to promote optimal health. Assessments also help employees manage their health care and allow companies to control their health care costs.

**Note:** If you are planning to offer health risk assessments, to help you prepare, we recommend using the CDC Healthier Worksite Initiative’s Health Risk Appraisal Checklist: [http://www.cdc.gov/nccdphp/dnpao/hwi/downloads/HRA_checklist.pdf](http://www.cdc.gov/nccdphp/dnpao/hwi/downloads/HRA_checklist.pdf)
# HEALTH STATUS QUESTIONNAIRE

Circle the number to the right of each question that best fits your response.

<table>
<thead>
<tr>
<th>Health</th>
<th>Never</th>
<th>Rarely</th>
<th>Occasional</th>
<th>Regularly</th>
<th>Constantly</th>
</tr>
</thead>
<tbody>
<tr>
<td>How often have your experienced the following physical, mental, or emotional states in the past year:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presence of physical pain (neck/back, arms, legs, etc.)</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Feelings of tension, stiffness lack of flexibility in spine</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Incidence of fatigue or low energy</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Incidence of colds or flu</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Incidence of headaches</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Incidence of allergies, eczema or skin rash</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Incidence of dizziness or lightheadedness</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Incidence of accidents or near accidents, falling or tripping</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Stress related to pain</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Difficulty with sleep (falling asleep, staying asleep)</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Experience depression or lack of interest</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Difficulty concentrating, indecisiveness, restlessness</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Difficulty adjusting to changes in your life</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stress</th>
<th>None</th>
<th>Very Little</th>
<th>Some</th>
<th>Quite A Bit</th>
<th>A Lot</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much stress does your general state of well-being cause you?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>How much stress do your family, loved ones, significant others and friends cause you?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>How much stress does your career (job, school) cause you?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>How much stress does your emotional state cause you?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Exercise &amp; Relaxation</th>
<th>Never</th>
<th>Rarely</th>
<th>Occasional</th>
<th>Regularly</th>
<th>Constantly</th>
</tr>
</thead>
<tbody>
<tr>
<td>How often do you experience relaxation, ease, and feelings of well-being?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>How often are you satisfied with the level of recreation/hobbies in your life?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Exercise &amp; Relaxation</th>
<th>None</th>
<th>Very Little</th>
<th>Some</th>
<th>Quite A Bit</th>
<th>A Lot</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much interest do you have in maintaining a healthy lifestyle through diet and physical fitness?</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Modified by: Northern California Center for Well-Being, www.norcalwellbeing.org
Worksite Health Access Survey

A. Physical Activity

1. What types of facilities or resources does your organization provide for employees to engage in physical activity?

2. Does your worksite have a place for employees to go for a walk? [ ] Yes [ ] No
   a. If yes, can employees walk: [ ] Indoors or [ ] Outdoors
   b. If yes, is this place: (check all that apply)
      [ ] Well lit
      [ ] Safe from traffic, cars and machinery
      [ ] Secure from intruders
      [ ] Well ventilated
      [ ] Attractive

3. Does your organization have organized physical activities for employees? [ ] Yes [ ] No

4. Does your organization have access to physical activity facilities? [ ] Yes [ ] No

5. Does your organization have access to an indoor exercise facility? [ ] Yes [ ] No
   If yes, what equipment does it provide: (check all that apply)
   [ ] Aerobic equipment (e.g. bikes, stair climbers, treadmills)
   [ ] Running track
   [ ] Swimming pool
   [ ] Strength training equipment
   [ ] Other

6. When is the exercise facility open? (check all that apply) [ ] [ ]
   [ ] Before work hours
   [ ] After work hours
   [ ] During work hours

   Is the facility free or discounted to employees? [ ] Free [ ] Discounted

   Can family members of employees use the facility? [ ] Yes [ ] No

7. Does your organization subsidize memberships to off-site physical activity facilities? [ ] Yes [ ] No

8. Does your organization encourage the use of stairs for physical activity? [ ] Yes [ ] No

9. Does your organization provide any incentives or rewards to employees who are physically active? [ ] Yes [ ] No

10. Does your organization offer a health plan which provides discounts for health club membership? [ ] Yes [ ] No

B. Nutrition

11. Can employees in your organization obtain food or snacks at the workplace? [ ] Yes [ ] No
    If no, please skip to question #14.

12. Where are the food or snacks offered? (check all that apply)
    [ ] Cafeteria
    [ ] Break room or company kitchen
    [ ] Canteen truck/snack bar
    [ ] Vending machines
    [ ] Caterer
    [ ] Other: (describe)
13. If your organization has vending machines, what types of food are available through the machines? *(check all that apply)*
   - [ ] Candy, chips, or cookies
   - [ ] Soda
   - [ ] Pretzels
   - [ ] Fresh vegetables/ Salads
   - [ ] 100 % fruit juice
   - [ ] Fresh fruit/ Dried fruit
   - [ ] Granola bars or trail mix
   - [ ] Yogurt/One % or skim milk
   - [ ] Water

14. Can your employees obtain any of the following foods in the work place? *(check all that apply)*
   - [ ] Fresh fruit
   - [ ] 100 % fruit juice
   - [ ] Cooked vegetables
   - [ ] Fresh salads
   - [ ] Fat free or low fat salad dressing
   - [ ] One % or skim milk
   - [ ] Fat free or low fat yogurt

15. Does your organization have written policies or guidelines to ensure that fruit, vegetables and salads are offered at catered meetings? [ ] Yes [ ] No

16. Does your organization have a place where employees can refrigerate and heat meals? [ ] Yes [ ] No

17. Does your organization offer nutrition education programs to your employees? [ ] Yes [ ] No

18. Does your organization offer weight control programs? [ ] Yes [ ] No

19. Does your organization offer reimbursement or discounts for dietary counseling, whether through health insurance or direct subsidy? [ ] Yes [ ] No

C. Smoking

20. Does your organization have a written smoke-free environment policy? [ ] Yes [ ] No
   a. If no, go to 24.

21. Are employees who violate the policy penalized in any way? [ ] Yes [ ] No

22. Where is smoking prohibited? *(check all that apply)*
   - [ ] In offices
   - [ ] Throughout the office buildings
   - [ ] Throughout the grounds
   - [ ] In company vehicles

23. Where is smoking permitted? *(check all that apply)*
   - [ ] In designated areas of office buildings
   - [ ] Outside of office buildings
   - [ ] In company vehicles

24. Do you offer programs to help employees quit smoking? [ ] Yes [ ] No

25. Does your organization offer reimbursement or discounts to employees who enroll in programs to quit smoking, whether through health insurance or direct subsidy? [ ] Yes [ ] No

D. Other Health Programs

26. In the past 12 months, has your organization offered employees any health education classes, workshops, lectures or special events? [ ] Yes [ ] No
27. In the past 12 months, has your company offered any of the following health screening services? (check all that apply)
   [ ] Blood pressure screening
   [ ] Cholesterol screening
   [ ] Blood sugar screening

28. Are your employees allowed to use paid work time to participate in health-related activities? [ ] Yes [ ] No
   a. If yes, is this for: [ ] Activities at work? [ ] Time off to participate elsewhere?
   b. If yes, in which activities are employees allowed to use paid work time for participation? (check all that apply)
      [ ] Blood pressure screening
      [ ] Cholesterol or blood sugar screenings
      [ ] Nutrition classes
      [ ] Physical activity
      [ ] Classes to quit smoking
      [ ] Weight control programs
      [ ] Stress management

29. Does your organization have a written flextime policy? [ ] Yes [ ] No

30. Does your organization participate in an Employee Assistance Program (EAP)? [ ] Yes [ ] No

31. In the past 12 months, has your organization solicited feedback from employees on the types of health programs and services that would be beneficial to them? [ ] Yes [ ] No

32. Does your organization have a budget for colleague health promotion? [ ] Yes [ ] No

32. Is there a designated person, group or committee within your organization who is responsible for employee health promotion? [ ] Yes [ ] No

34. Does your organization offer family leave for employees to care for sick family members? [ ] Yes [ ] No

E. About Your Organization

35. How would you describe the attitude of your organization’s leadership toward the promotion of health among your colleagues?
   [ ] Strongly supportive
   [ ] Somewhat supportive
   [ ] Neutral attitude
   [ ] Not very supportive
   [ ] Not at all supportive

36. Which of the following statements best describes your organization’s health insurance benefit?
   [ ] We do not offer health insurance to employees
   [ ] We offer a health insurance plan, but do not contribute a %age of the premium
   [ ] We offer a health insurance plan and contribute a %age of the premium

37. Does your organization work more than one shift per day? [ ] Yes [ ] No
   a. If yes, do employees on all shifts have equal access to the following resources? (check all that apply)
      [ ] Physical activity programs
      [ ] Fresh fruits, vegetables and low fat foods
      [ ] Health screenings
      [ ] Nutrition education programs
      [ ] Weight loss programs
      [ ] Tobacco cessation programs
      [ ] Safety

Thank you very much for participating.

We are pleased to be offering a Worksite Wellness program at **Company Name**. We firmly believe that quality health plays an important role in the success of our company. The purpose of this survey is to obtain everyone’s input and includes questions on your needs and interests to be used in deciding what programs to offer and when to offer them.

As a thank you for your participation, you will be entered into a contest to win a prize.
Your completion of this survey is completely voluntary.
The survey is completely anonymous.
There is no right or wrong answer.

*Please indicate how likely you would be to participate in each of the following programs if they were offered at work during the next year.* *(Circle the number to the right that best fits your response.)*

<table>
<thead>
<tr>
<th>Educational Programs</th>
<th>Scale of Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very</td>
</tr>
<tr>
<td>Accepting Change</td>
<td>1</td>
</tr>
<tr>
<td>Back Safety</td>
<td>1</td>
</tr>
<tr>
<td>Cancer Prevention</td>
<td>1</td>
</tr>
<tr>
<td>Caring for Elderly Parent</td>
<td>1</td>
</tr>
<tr>
<td>Cholesterol Reduction</td>
<td>1</td>
</tr>
<tr>
<td>Chronic Pain</td>
<td>1</td>
</tr>
<tr>
<td>Communication Skills</td>
<td>1</td>
</tr>
<tr>
<td>Diet and Nutrition</td>
<td>1</td>
</tr>
<tr>
<td>Emotional Eating</td>
<td>1</td>
</tr>
<tr>
<td>Headache Prevention/treatment</td>
<td>1</td>
</tr>
<tr>
<td>Healthy Cooking (meals/snacks)</td>
<td>1</td>
</tr>
<tr>
<td>Healthy Eating (do's &amp; don'ts)</td>
<td>1</td>
</tr>
<tr>
<td>Heart Disease Prevention</td>
<td>1</td>
</tr>
<tr>
<td>Home Safety</td>
<td>1</td>
</tr>
<tr>
<td>Managing Anger/ Emotions</td>
<td>1</td>
</tr>
<tr>
<td>Managing Chronic Conditions (diabetes, hypertension, arthritis)</td>
<td>1</td>
</tr>
<tr>
<td>Managing Chronic Pain</td>
<td>1</td>
</tr>
<tr>
<td>Mind/Body Connection/Meditation</td>
<td>1</td>
</tr>
<tr>
<td>Parenting Skills</td>
<td>1</td>
</tr>
<tr>
<td>Smoking Cessation</td>
<td>1</td>
</tr>
<tr>
<td>Stress Reduction</td>
<td>1</td>
</tr>
<tr>
<td>Substance Abuse</td>
<td>1</td>
</tr>
<tr>
<td>Time Management Programs</td>
<td>1</td>
</tr>
<tr>
<td>Weight Management</td>
<td>1</td>
</tr>
<tr>
<td>Yoga for the Office</td>
<td>1</td>
</tr>
</tbody>
</table>

Name other lectures you would attend:
<table>
<thead>
<tr>
<th>Physical Assessments/Health Screenings</th>
<th>Scale of Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very Unlikely</td>
</tr>
<tr>
<td>Body Fat Testing</td>
<td>1</td>
</tr>
<tr>
<td>Blood Pressure/resting pulse</td>
<td>1</td>
</tr>
<tr>
<td>Cholesterol Levels</td>
<td>1</td>
</tr>
<tr>
<td>Fitness Assessment</td>
<td>1</td>
</tr>
<tr>
<td>Triglycerides/Blood Sugar</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fitness Programs</th>
<th>Scale of Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very Unlikely</td>
</tr>
<tr>
<td>Corporate Fitness Membership Rates</td>
<td>1</td>
</tr>
<tr>
<td>Low-impact Exercise Equipment</td>
<td>1</td>
</tr>
<tr>
<td>Stretching Programs-On-Site</td>
<td>1</td>
</tr>
<tr>
<td>Walking Programs-On-Site</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Nutrition</th>
<th>Scale of Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not at all</td>
</tr>
<tr>
<td>Cafeteria with Healthy Choices</td>
<td>1</td>
</tr>
<tr>
<td>Meeting Policy for Healthy Snacks</td>
<td>1</td>
</tr>
<tr>
<td>Onsite Vending Machines with Healthy Choices</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Needs</th>
<th>Scale of Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not at all</td>
</tr>
<tr>
<td>What other program/service would you like to see?</td>
<td></td>
</tr>
</tbody>
</table>

Please indicate how likely you would be to participate in health promotion programs during the following times:

<table>
<thead>
<tr>
<th></th>
<th>Scale of Importance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not at all</td>
</tr>
<tr>
<td>Before Work</td>
<td>1</td>
</tr>
<tr>
<td>During Lunch at Work</td>
<td>1</td>
</tr>
<tr>
<td>After Work</td>
<td>1</td>
</tr>
</tbody>
</table>

Thank you so much for your time taking this survey.

Source: Northern California Center for Well-Being, www.norcalwellbeing.org
STEP 3 – WELLNESS GOALS & OBJECTIVES
**Step 3 – Wellness Goals & Objectives**

Before you begin designing wellness policies or programs, it’s important to have specific goals identified and objectives developed for each of the goals. These should come from the assessments and should be created with input from management and staff. One of the best ways to gain employee input is to develop a wellness team.

A wellness team brings management and staff together to develop and implement worksite wellness policies and/or programs. This increases the chance that all employees have a voice. The team also helps motivate employees at all levels in order to ensure the success of the program. If you are a small business and are not able to put together a wellness team, it is recommended that you assign a wellness coordinator to develop the goals and objectives.

The following are five common areas under which worksite wellness goals and objectives have been developed.

- Healthy Food
- Health Awareness
- Physical Activity
- Smoke-Free Workplace
- Lactation Accommodation
STEP 4 – POLICY DESIGN

RESOURCES INCLUDED IN THIS SECTION:

1. Policy Examples – Healthy Food | PG13
2. Policy Examples – Health Awareness | PG19
3. Policy Examples – Physical Activity | PG24
4. Policy Examples – Smoke-Free Workplace | PG28
5. Policy Examples – Lactation Accommodation | PG33
**STEP 4 – Policy Design**

Worksite wellness policies can create widespread behavior change among employees. This is because policies change the work environment. These changes can result in employees adjusting their eating and physical activity habits. Developing worksite wellness policies is therefore a great way to ensure that everyone is on the same page when it comes to health and wellness.

Once you have identified your objectives, it is time to develop worksite wellness policies that will help you reach these objectives. Consider whether existing policies need to be changed or whether new ones need to be developed.

Sample goals, objectives, policies, and programs can be found at the end of this manual for the following categories:

- Healthy Food
- Health Awareness
- Physical Activity
- Smoke-Free Workplace
- Lactation Accommodation
Healthy Food Policy – Example #1

**Goal:** Increase healthy food options for employees

**Sample Objective**
- Vending machines will include 30% healthy food choices by (insert date)

**Sample Policies**
- Vending machines will offer a variety of snack foods. 30% of the items will be healthful alternatives that are low sugar, trans fat free, and low fat food options
- Drink machines will provide fruit juices, as well as sugar-free and caffeine-free soda selections

**Sample Programs**
- Offer healthy snacks: work with vending companies to identify snacks that meet “healthy food” guidelines
- Offer taste testings: identify the healthy vending snacks that employees are more likely to buy. This prevents healthy snacks from being thrown away because they are not sold. A taste testing also allows employees to have ownership of the program
- Include healthy food choices in vending machines -see website for link to vending machine standards
Healthy Food Policy – Example #2

**Goal:** Increase healthy food options for employees

**Sample Objective**
- Meetings/functions will offer one or more healthful food and snacks by (insert date)

**Sample Policies**
- Food choices that are low in fat will be offered at company meetings and functions
- At functions that offer a selective menu or buffet, one or more healthful entrees, side dishes, or desserts will be served (*or only healthful foods will be served*)
- When a non-selective menu is served, healthful selections will be offered (*or only healthful snacks will be offered*)
- When high fat, sugar or sodium foods are served, food purchased with company funds must include a healthy alternative
- Healthy snacks will be offered at all company meetings, seminars, and catered events

**Sample Programs**
- Offer health food at meetings:
  - See website for link to healthy meeting checklist from the University of Hawaii at Manoa
  - See website for link to Healthy Meeting Policies from CA Fit Business Kit
Healthy Food Policy – Example #3

Goal: Increase healthy food options for employees

Sample Objective
- Menus for dining rooms/cafeterias shall be consistent with the latest guidelines recommended by leading health organizations by (insert date)

Sample Policies
- Healthy menu items shall contain no more than 1/3 of the recommended daily nutrition of calories, fat, cholesterol, and sodium
- Healthy menu items will include an emphasis on fruits and vegetables.
- A symbol such as 🍎 will be used on a menu to indicate dishes that provide at least 1 serving of fruit or vegetables (approximately ½ cup) for side dishes, appetizers and desserts and 2 servings for entrées (approximately 1 cup)

Sample Programs
- Provide food samples: have companies, nutritionists, cooking schools offer food demonstrations, cooking classes, healthy food samples
- Offer healthy menu items: see appendix for PDF
- Highlight healthy foods: identify heart-healthy snack idea in the cafeteria
- Develop signs or placards distinguishing the healthy food options
Healthy Food Policy – Example #4

Goal: Increase healthy food options for employees

Sample Objective
• Where affordable and possible, organic and safe foods will be researched and considered by (insert date)

Sample Policies
• Safe foods are defined as antibiotic and hormone free meat and dairy and pesticide-free fruits and nuts

Sample Programs
• Buy food locally: work with local farmers to deliver farm fresh food directly to your worksite. A simple way is through a CSA – Community Sponsored Agriculture Program to provide locally grown, seasonal, fruits and vegetables on a subscription basis (cost is typically $13-30 a box)
• See website for guides and more information on farmers' markets, family farms, and other sources of sustainable agriculture
Healthy Food Policy – Example #5

**Goal:** Build excitement among employees

**Sample Objective**
- Include at least one employee from each department in developing healthy food programming by (insert date)

**Sample Policies**
- Employees and management will be recruited to participate on the company wellness team

**Sample Programs**
- Develop Programs that Require Employee Involvement
- Develop a cookbook of employees’ low-fat recipes
- Exchange recipes
- Feature a healthy employee recipe periodically in the newsletter or bulletin board
- Recipe contests
- Home-grown fruit and vegetable exchanges
Healthy Food Policies – Written Example

[COMPANY NAME] is dedicated to providing a work environment that supports employee and workplace health. There is a general consensus today that certain dietary factors are associated with the prevention of chronic diseases such as heart disease and cancer. We believe it is important to provide employees with healthy food choices that support their efforts to prevent disease and attain optimum health.

Healthy Meetings
[COMPANY NAME] will provide food choices that are low in fat at company meetings and functions. At functions that offer a selective menu or buffet, one or more healthful entrees, side dishes or desserts will be served. When non-selective menu is served, healthful selections will be offered.

Healthy Vending Machines and Carts
Vending machines will offer a variety of snack foods. 30% of the items will be healthful alternatives that are low sugar, trans fat free, and low fat food options. Drink machines will provide fruit juices, as well as sugar-free and caffeine-free soda selections. Decaffeinated coffee will be available as an alternative in the coffee area. Fresh fruit will be made available in the lunchroom.

Healthy Menus
Menus for dining rooms/cafeterias shall be consistent with the latest guidelines recommended by leading health organizations. Healthy menu items shall contain no more than 1/3 of the recommended daily nutrition of calories, fat, cholesterol, and sodium. Healthy menu items will also include an emphasis on fruits and vegetables.

A symbol such as 🍎 will be used on a menu to indicate dishes that provide at least 1 serving of fruit or vegetables (approximately ½ cup) for side dishes, appetizers and desserts and 2 servings for entrées (approximately 1 cup).
Health Awareness Policy – Example #1

Goal: Increase employee awareness of healthy behaviors and available health resources

Sample Objective
• Employees will be offered free health risk assessments every two years beginning (insert date)

Sample Policies
• The wellness team will coordinate with a local agency to offer free health risk assessments every two years

Sample Programs
• Contract with Local Wellness Agencies to Conduct Assessments:
  - Northern California Center for Well-Being
  - Kaiser Permanente, Health Works Program
  - Sutter Health – Live Well for Life
Health Awareness Policy – Example #2

**Goal:** Increase employee awareness of healthy behaviors and available health resources

**Sample Objective**
- Offer on-site health education programming at least once a month beginning (insert date)

**Sample Policies**
- Employees will be offered several venues for education such as health fairs, on-site health education classes, or brown bags once a month. Possible topics include chronic disease prevention, obesity prevention, how to eat better, and lower stress

**Sample Programs**
- Offer on-site health education sessions about healthy eating, healthy food choices, and nutrition education
  - The Northern California Center for Well-Being has speakers and educators available in Sonoma County
- Host a health fair: Invite local organizations (local hospitals, fitness centers, acupuncturists, chiropractors) to share materials on topics related to health, fitness, and nutrition. Offer free blood pressure/fitness screenings, flu shots
Health Awareness Policy – Example #3

**Goal:** Increase employee awareness of healthy behaviors and available health resources

**Sample Objective**
- Educate employees of basic exercise recommendations from the American Heart Association by (insert date)

**Sample Policies**
- Employees will be informed through newsletters, emails and/or posters about the basic exercise recommendations for healthy adults from reputable sources

**Sample Programs**
- Offer Exercise Guidelines:
  - The [College of Sports Medicine](https://www.acsm.org) offers exercise guidelines, tips for meeting the guidelines, and how to start an exercise program
Health Awareness Policy – Example #4

**Goal:** Increase employee awareness of healthy behaviors and available health resources

**Sample Objective**
- Distribute chronic disease prevention material such as heart health and diabetes prevention/management beginning (insert date)

**Sample Policies**
- Health education materials from reputable sources, such as the CDC, will be distributed once a month via newsletters, emails, or flyers to increase awareness of chronic disease prevention

**Sample Programs**
- **Provide Online Educational Resources:**
  - Diabetes risk test available from [American Diabetes Association](#)
  - Health quizzes (i.e. high blood pressure, sodium, cholesterol, physical activity, workout) are available from [American Heart Association](#)

- **Provide Printed Education Resources:**
  - [American Diabetes Association](#) - Offers a kit of resources for the workplace to increase awareness of risk factors and information to prevent and manage diabetes
  - [American Institute of Preventive Medicine](#) - Offers a variety of health educational materials
  - [National Health Information Clearinghouse](#) – Provides resources regarding health observances throughout the year
Health Awareness Policies - Written Example

Exercise Recommendations

At [COMPANY NAME] we believe that education is essential when demonstrating to all employees the benefits of exercise. Employees will be informed through newsletters, email correspondence and/or posters about the basic exercise recommendations from the American College of Sports Medicine and the American Heart Association for healthy adults:

• Moderately intense cardio 30 minutes a day, five days a week
  Or
• Vigorously intense cardio 20 minutes a day, 3 days a week
  And
• 8 to 10 strength-training exercises, 8 to 12 repetitions of each exercise twice a week.

Moderate-intensity physical activity means working hard enough to raise your heart rate and break a sweat, yet still being able to carry on a conversation. It should be noted that to lose weight or maintain weight loss, 60 to 90 minutes of physical activity may be necessary. The 30-minute recommendation is for the average healthy adult to maintain health and reduce the risk for chronic disease.

Health Education

Health education materials will be distributed to increase awareness and provide continuing education for employees.

• An emphasis will be placed on chronic disease prevention.
• Education about risks of obesity.
• Other materials for how to eat better; exercise more; lower stress such as stretching techniques while at the computer.
Physical Activity Policy – Example #1

Goal: Adopt and implement worksite wellness programs that promote physical activity

Sample Objective
• Develop at least one walking program and offer incentives to encourage walking throughout the workday beginning (insert date)

Sample Policies
• Provide a work environment that supports and encourages walking in as many creative ways as possible
• Schedule work hours so that any employee who wishes to participate in a walking program may do so. The time for this activity shall be determined by an agreement between the employee and their immediate supervisor so as not to interfere with normal work requirements

Sample Programs
• Encourage employees to walk to a specific location and log individual miles for prizes
• Start incentive-based programs to encourage walking (i.e., interoffice challenge between departments or worksite locations)
• Start a lunchtime walking club or offer flexible lunch periods/breaks to encourage individual, group or “buddy” walks
• Participate in community walks (i.e., Heart, Cancer, March of Dimes). Ask the company to sponsor employee participants or to match employee contributions
• Develop indoor and outdoor wellness trails that are accessible to employees of all abilities
• Develop walking maps. Consider measuring the distance in halls and around the building for setting walking goals
• Repair and maintain sidewalks and paths around the worksite
• Encourage managers to hold walking meetings when meeting with a small number of employees. Offer incentives for distance parking and for employees who walk (or bicycle) to work
• Designate “sneaker days” to promote walking or “Casual Friday”
• See website for walking program links from California 5-A-Day, the American Diabetes Association’s Club Ped, Walking Club Motivational Program
Physical Activity Policy – Example #2

Goal: Adopt and implement worksite wellness programs that promote physical activity

Sample Objective
• Promote 30 minutes of physical activity daily for employees beginning (insert date)

Sample Policies
• Encourage employees to exercise thirty minutes per day, for a minimum of three days per week, preferably five days.
• Encourage many movement breaks during the day that add up to thirty minutes.

Sample Programs
• During the workday, encourage physical activity breaks such as stretching or walking
• Offer three 10-minute movement breaks during long meetings and conferences. Move at one’s own pace that is comfortable, and does not cause pain, as long as it warms the muscles and gets the heart pumping
• Offer incentives to encourage 30 minutes of physical activity daily. For example, those who exercise 30 minutes a day, 20 days/month can be entered in a raffle
Physical Activity Policy – Example #3

**Goal:** Adopt and implement worksite wellness programs that promote physical activity

**Sample Objective**
- Promote more stair use beginning (insert date)

**Sample Policies**
- Stairwells will be clear of clutter and have signs posted near the elevators in order to promote more use

**Sample Programs**
- Provide clean, safe, and aesthetically appealing stairwells to encourage stair use by employees
- Add colorful, motivational signs or murals at stairwells to encourage usage – have an employee contest to design and/or paint
- Promote a stair climbing competition or an “Avoid the Elevator Campaign.”
- See the website for links to promoting stair usage and more ideas
Physical Activity Policies - Written Example

Fit Business Policy

[COMPANY NAME] encourages employees to exercise thirty minutes per day, for a minimum of three days per week. Supervisors are encouraged, where possible, to schedule working hours such that any employee who wishes to participate in an exercise program may do so. The time for this activity shall be determined by an agreement between the employee and their immediate supervisor so as not to interfere with normal work requirements.

Exercise programs such as structured aerobics, walking, jogging, swimming, bicycling, and weight control classes, are examples of programs that qualify for approval.

Walking Policy

[COMPANY NAME] is dedicated to providing a work environment that supports and encourages walking in as many creative ways as possible.
Smoke-Free Workplace Policy – Example #1

Goal: Eliminate smoking at the workplace

Sample Objective
- No smoking allowed inside any company offices or buildings by (insert date).

Sample Policies
- No smoking of tobacco products will be allowed within the facilities at any time.
  
  OR

- No smoking of tobacco products is permitted within the facilities or on the property of [Company Name] at any time.

Sample Program:

Program guides or classes are available. See website for links:
- Making Your Workplace Smokefree - A Decision Maker's Guide (CDC)
- Employee Smoking Cessation Guide (Professional Assisted Cessation Therapy)

Offer Smoking Cessation Resources:
- How to Quit - Government resources (CDC)
- Nicotine Anonymous
- Quitnet - An online support group for individuals trying to quit smoking
- American Lung Association - Smoking cessation support website

Offer Smoking Cessation Classes:
- Northern California Center for Well Being has onsite classes in Santa Rosa and at your site.
Smoke-Free Workplace Policy – Example #2

**Goal:** Eliminate smoking at the workplace

**Sample Objective**
- No smoking in company vehicles by (insert date)

**Sample Policies**
- No smoking in any company vehicle is permitted
- There will be no tobacco use in personal vehicles when transporting persons on authorized business

**Sample Programs**
- Place “no smoking” stickers in company vehicles
- Send out a memo regarding new policy
Smoke-Free Workplace Policy – Example #3

Goal: Eliminate smoking at the workplace

Sample Objective
- Discuss additional options with employees by (insert date).

Sample Policies
- Supervisors will discuss the issue of smoking breaks with their staff. Together they will develop effective solutions that do not interfere with the productivity of the staff.

Sample Programs
- Develop a team of employees and management to discuss solutions that work for all employees.
**Smoke-Free Workplace Policy – Example #4**

**Goal:** Eliminate smoking near non-smoking employees

**Sample Objective**
- Offer specific designated smoking areas by (insert date)

**Sample Policies**
- The decision to provide or not provide designated smoking areas outside the building will be at the discretion of management or other decision-making body
- The designated smoking area will be located at least 20 feet [*recommended*] from the main entrance
- All materials used for smoking in this area, including cigarette butts and matches, will be extinguished and disposed of in appropriate containers. Supervisors will ensure periodic cleanup of the designated smoking area. If the designated smoking area is not properly maintained (for example, if cigarette butts are found on the ground), it can be eliminated at the discretion of management or other decision-making body.

**Sample Programs**
- Designate “smoking” areas with signs and other identifying markers, such as a painted boundaries or smoking tables
- Place signs or window clings on all doors stating that there is no smoking within 20 feet of the doorway
- Provide containers for cigarette butts in the designated smoking area
**Smoke-Free Workplace Policies - Written Example**

[COMPANY NAME] recognizes the hazards caused by exposure to environmental tobacco smoke. Passive smoking/secondhand smoke has been medically proven to cause lung cancer and heart disease in non-smokers, as well as many other illnesses and minor conditions. Therefore it shall be our policy to provide a smoke-free environment for all employees and visitors. This policy covers the smoking of any tobacco products and the use of oral tobacco products or "spit" tobacco and applies to both employees and non-employee visitors.

- No smoking of tobacco products will be allowed within the facilities at any time.
  - The decision to provide or not provide designated smoking areas outside the building will be at the discretion of management or other decision-making body.
  - The designated smoking area will be located at least 20 feet from the main entrance.
  - All materials used for smoking in this area, including cigarette butts and matches, will be extinguished and disposed of in appropriate containers. Supervisors will ensure periodic cleanup of the designated smoking area. If the designated smoking area is not properly maintained (for example, if cigarette butts are found on the ground), it can be eliminated at the discretion of management or other decision-making body.

- No smoking in any company vehicle is permitted.

- There will be no tobacco use in personal vehicles when transporting persons on authorized business.

- Supervisors will discuss the issue of smoking breaks with their staff. Together they will develop effective solutions that do not interfere with the productivity of the staff.

- **Source:** this material is adapted from *Making Your Workplace Smoke-free: A Decision Maker's Guide*, from the Centers for Disease Control and Prevention (CDC).
Lactation Accommodation Policy – Example #1

Goal: To establish guidelines for promoting a breastfeeding-friendly work environment

Sample Objective
- Create breastfeeding policies

Sample Policies
- Since it is recommend that babies breastfeed exclusively for six months, and continue to
  breastfeed for at least the first year of life, we promote and support breastfeeding and the
  expression of breast milk by employees who choose to continue breastfeeding when they return
  to work.

Sample Programs
- Offer lactation accommodation resources to employees
- Provide extended maternity leave beyond the time allowed under the Family Medical Leave Act
  and California Family Rights Act
- Supervisors are encouraged to consider flexible schedules to accommodate employee's needs
- Provide options of part-time work, telecommuting/working from home, or job sharing to
  breastfeeding employees to ease the transition back to work
- Encourage the formation of a lunchtime breastfeeding mother support group at the worksite
Lactation Accommodation Policy – Example #2

Goal: To establish guidelines for promoting a breastfeeding-friendly work environment

Sample Objective
- Educate employees about California Law regarding lactation accommodation

Sample Policies
- This policy will be communicated to all employees upon hire and at the time employees request family leave
- Any form of discrimination or harassment of breastfeeding mothers will not be tolerated

Sample Programs
- A copy of the law can be found at:
- Post policy
- Provide referrals to breastfeeding resources and services in the community
- Post posters about Ca laws regarding lactation accommodation laws.
- Incorporate breastfeeding information into employee wellness program, memos and email newsletters
- Supervisors will ensure that employees are aware of these workplace accommodations prior to maternity leave
Lactation Accommodation Policy – Example #3

**Goal:** Employees will be allowed sufficient break time to express milk while at work

**Sample Objective**
- Employees will be allowed sufficient break time to express milk while at work

**Sample Policies**
- Lactation times shall be established for each employee based on her work schedule. If possible, the lactation time is to run concurrently with any break time already provided
- Lactation time beyond the regular break time is unpaid and will be negotiated between the employee and her supervisor

**Sample Programs**
- The breastfeeding employee may be offered flexible assignments to accommodate pumping or breastfeeding.
Lactation Accommodation Policy - #4

**Goal:** Employees will be allowed sufficient break time to express milk while at work.

**Sample Objective**
- A private area will be made available for breastfeeding employees to breastfeed or express their milk.

**Sample Policies**
- Space available to the employee will include an electrical outlet, comfortable seating and proximity to the employee’s work area. The lactation area will be determined by the employee and her supervisor.

**Sample Programs**
- Appropriate signage and/or other security measures to identify the occupied status of the “Lactation Area.”
Lactation Accommodation Policies - Written Example

Background:
According to the U.S. Dept. of Health and Human Services, human milk is the optimal food for growth and development of infants because it boosts the immune system and helps protect the baby from common childhood illnesses and infections. It is recommend by the American Academy of Pediatricians that babies breastfeed exclusively for six months, and continue to breastfeed for at least the first year of life, and beyond.

The California legislature encourages all employers to strongly support the practice of breastfeeding by striving to accommodate the needs of employees to breastfeed and/or express milk for their children. California’s Lactation Accommodation Law (2002) specifically requires employers to make a reasonable effort to provide a private space for employees who desire to breastfeed or express breastmilk.

If possible, the break time should coincide with the employee’s paid break time. If not, the break time need not be paid. Typically, a lactating woman needs to express breastmilk about every 2-3 hours when she is away from her baby. Twenty to forty minutes is generally needed for each pump session. Women need time to set up and clean equipment, collect, label, and store milk.

Purpose:
To establish guidelines for promoting a breastfeeding friendly work environment for [COMPANY NAME] employees.

Policy:
At [COMPANY NAME], we recognize that one of the top reasons many women stop breastfeeding early is returning to work. Breastfeeding is a normal part of daily life for mothers and infants. Breast milk is the optimal food for growth and development of infants.

Since it is recommend that babies breastfeed exclusively for six months, and continue to breastfeed for at least the first year of life, we promote and support breastfeeding and the expression of breast milk by employees who choose to continue breastfeeding when they return to work.

Lactation times shall be established for each employee based on her work schedule. If possible, the lactation time is to run concurrently with any break time already provided. Lactation time beyond the regular break time is unpaid and will be negotiated between the employee and her supervisor.

Space available to the employee will include an electrical outlet, comfortable seating, privacy and close proximity to the employee’s work area. The lactation area will be determined by the employee and her supervisor.

[COMPANY NAME] will not tolerate any form of discrimination or harassment of breastfeeding mothers.

All managers and supervisors will receive orientation to this policy. This policy will be communicated to all employees that request family leave.
STEP 5 – POLICY IMPLEMENTATION
**STEP 5 - Policy Implementation**

It is important to inform your employees in advance that a new policy is being developed. Doing so allows employees to talk openly about the changes and prevents unexpected surprises, such as when healthy food replaces unhealthy food at meetings or smoking is no longer allowed around the office building.

To help make the transition as smooth as possible, worksites can encourage open communication, provide a timeline for implementation, and show that management supports the policy changes.

Here are a few ways to inform and get buy-in from both management and staff:

**Management**
- Have the chief executive officer, owner, or senior management announce the development of worksite wellness policies and/or programs. See sample letter in support of worksite wellness.
- Schedule meetings to familiarize mid-level managers/supervisors of their role in implementing and promoting the policies.
- Ask management to model healthy behaviors.
- Offer short informational meetings about the policy changes.

**Staff**
- Have management introduce new policies at regular staff meetings.
- Post signs on bulletin boards, in the break room, rest rooms, and company vehicles (i.e. no smoking signs).
- Send out a memo via:
  - Paychecks
  - E-mails
  - Web-based electronic bulletin boards or the company’s website
  - Flyers or pamphlets in employees’ mailboxes
- Include new/revised policies in training manuals and new staff orientations.
STEP 6 – PROGRAM DESIGN

RESOURCES INCLUDED IN THIS SECTION:

1. WORKFORCE WELLNESS PROGRAM DESIGN OPTIONS
**Step 6 – Program Design**

Program design is a great way for your worksite wellness team or coordinator to use their creativity and imagination to develop programs that your employees will support. They can develop new programs or use existing online resources.

When developing a program, consider packaging related strategies together. What does this mean? For example, develop a program that encourages physical activity at break time. Then, give away pedometers as incentives and provide maps of on-site trails to get staff walking. This will lead to greater success than if a program or policy existed alone. By packaging related strategies together, your employees have greater incentive to participate. This, in turn, can lead to the long-term success of your worksite wellness program.

Using the objectives, begin developing programs that will help you reach these objectives. Consider whether existing programs need to be changed or whether new ones need to be developed.

[Worksite Wellness Program Design Options](#) will give you some ideas of the types of programs you can develop.

**Special Note:** When developing programs, be sure to include how the programs will be evaluated in your operating plan. That includes developing evaluation forms before implementing the program.
# Worksite Wellness Program Design Options

<table>
<thead>
<tr>
<th>Program Component</th>
<th>Description</th>
<th>Resources</th>
<th>Ease of Use/Time</th>
<th>Effectiveness</th>
<th>Cost</th>
</tr>
</thead>
</table>
| **FREE Employee Wellness Campaigns**      | Programs and policies that facilitate groups of employees working together towards a common goal of healthy eating and/or physical fitness | American Cancer Society: *Active for Life Program*  
The Network for a Healthy CA: *California Fit Business Kit*  
St. Joseph’s Health  
Sutter Health: *Live Well for Life* | ⬤ | ⭐⭐ | 0-$ |
| **Exercise programs on and off site** to get your employees moving. | Employee membership to Fitness or Health Education Centers | CWB HeartWorks  
St. Joseph’s Health  
Sonoma County Family YMCA | ⭕ | ⭐⭐⭐⭐ | 0-$$ $$ |
| --- | --- | --- | --- | --- | --- |
| **Confidential Personal Wellness Profile** with individually tailored recommendations to improve health and lifestyle | Employees complete the wellness profile and mail to the Wellness Provider. A written, comprehensive and individualized report is provided to each employee, detailing his or her health risks and suggesting steps to take to improve health. Business can receive a summary with overall percentages but not individual results. | Northern California Center for Well-Being  
Kaiser Permanente  
St. Joseph’s Health  
Sutter Health: *Live Well for Life*  
Western Health Advantage | ⭕ | ⭐⭐⭐⭐ | 0-$$ $$ |
| **Nutritional Counseling** with registered dietitians and nutritional experts helps employees with weight loss and special dietary needs. | Each employee can schedule one 30 minute in person nutritional counseling session with a registered dietitian. If the employee has significant health problems, physician records may be requested prior to the session. | Northern California Center for Well-Being  
Kaiser Permanente  
St. Joseph’s Health  
Sutter Health: *Live Well for Life*  
Western Health Advantage  
Well Source | ⭕ | ⭐⭐⭐⭐ | 0-$$ $$ |
| **Clinical Screening** | Blood pressure; total cholesterol; body composition; blood glucose; consultation, flu shot | Kaiser Permanente  
St. Joseph’s Health  
Well Source | ⭕ | ⭐⭐⭐⭐ | 0-$$$$ |

**Symbol Key**

- ⭕ = Easy to implement, but time needed
- ⭕ = Increased scheduling and personnel time needed
- ⭐⭐⭐⭐⭐ = Good for promotion and to increase awareness
- ⭐⭐⭐⭐⭐⭐ = Short-term benefits that will promote healthy behavior. Linked to decrease in healthcare costs.
- ⭐⭐⭐⭐⭐⭐⭐ = Long-term benefits have been linked to such programs/ greatest opportunity for permanent healthy changes. Linked to decrease in healthcare costs.

$ = Inexpensive

$$ = Moderately priced or one-time fee

$$$ = Per employee costs often run higher; On-going group fee

$$$$ = Per employee costs and medical supplies fee
STEP 7 – PROGRAM IMPLEMENTATION

RESOURCES INCLUDED IN THIS SECTION:

1. PROGRAM LAUNCH MEMO
**Step 7 – Program Implementation**

Program implementation happens in much the same way that policy implementation happens:

- Inform your employees in advance that a new program is being developed
- Encourage open communication among employees
- Provide a timeline for implementation.
- Demonstrate that management fully supports the program

The biggest difference is that implementing a program requires the wellness team or coordinator make sure the employees know about the program and get involved. The best way to do this is through in-house marketing and a kick-off event:

**In House Marketing**

- Place posters and flyers prominently on bulletin boards, in the break room, and rest rooms
- Make an announcement at staff meetings
- Send out a memo via:
  - Paychecks
  - E-mails
  - Web-based electronic bulletin boards or the company’s website
  - Flyers or pamphlets in employees’ mailboxes

**Kick-Off Event**

- **Purpose**
  - Give employees detailed information about the program
  - Motivate people to register and participate
  - Make it a fun and interactive event that highlights management support

- **Possible Kick-Off Events**
  - Picnic
  - Brown-bag lunch
  - Presentation

- **Sample Kick-Off Event** – see Wellness Resources on the website, [Be Active! Worksite Program](#) (CA 5-A-Day)
Program Launch Memo

The following draft memo can be adapted to your own company circumstances.

To: All Employees
From: President and CEO

The _________ {Team/Executives/Committee} is pleased to offer a Worksite Wellness program at {Company Name}. We firmly believe that quality health plays an important role in the success of our company and we are laying the foundation for a healthier work environment through policy change and program implementation.

We are pleased to announce the kick-off of our new employee wellness program on {Start Date}.

Within the next month, we will be asking you to complete a confidential survey to assess what programs will most benefit your health and well-being. The purpose of this survey is to obtain employee input and will include questions on your needs and interests. Your answers will be used for deciding which programs to offer and when to offer them.

Our new wellness program is designed to help provide a healthful work environment and to support the adoption of healthy habits by employees who want to improve their own health and fitness levels.

For this coming year, the following major activities will be offered:

• A two-hour wellness workshop for all employees and spouses.
• A wellness newsletter will be sent to each employee’s home.
• A series of wellness classes to address tobacco use, healthy weight, and stress.
• Some changes in policies, work facilities, food access, etc., will be implemented to support healthy behaviors.

A new wellness financial incentive program will be introduced in the fall.

{Name of Wellness Coordinator/Team} will be responsible for developing and managing this new program. We will share with you the specifics of the program in the weeks ahead. The details of program offerings will be included in the newsletter and listed on our website.

Along with the rest of the executive team, I am personally excited about this new program, and I am very pleased that our organization is embarking on this new course towards wellness. Please join with me in supporting this new program effort.

Warm Regards,

{Name and Title}
STEP 8 – EMPLOYEE BUY-IN

RESOURCES INCLUDED IN THIS SECTION:

1. Employer’s Pledge
2. Employee’s Pledge
**Step 8 – Employee Buy-In**

Implementing worksite wellness programs and policies can be challenging. It’s important to make employees aware that the program exists, encourage participation, and motivate them to stay involved. Although getting employee buy-in can be difficult, it is not impossible. Here are a few ways to build employee excitement and interest:

**Management Support:** Management and supervisor support of your wellness program is crucial. Having support demonstrates to employees the commitment of management towards health and wellness, which can boost employee morale by blurring the line between “us” and “them.” Management support will also determine whether the program will ultimately succeed. Types of support can include:

- Communicating support of policies and programs to employees verbally
- Taking part in the wellness programs
- Providing work time for wellness programs
- Implementing policy and procedure changes
- Allocating funds for staffing, purchasing equipment, vendor services, supplies, and incentives

**Pledge Sheet:** Invite employees (management and staff) to sign a pledge sheet acknowledging their decision to focus on creating changes in their lives that benefit health and wellness.

**Newsletters:** Distribute newsletters, memos or articles to employees. Be sure to use science-based health information that describes or represents the wellness philosophy of your organization. Distribution of health information is a great way to let your employees know that the worksite wellness programs you offer can assist them in improving their health.

- **Resource:** [Wellness Councils of America](https://www.wellnesscouncils.org) provides regular health updates that may provide some useful health information for your employees.

**Guest Speakers:** Bring in a guest speaker from a well-recognized health organization to kick-off or introduce your worksite wellness program and get people excited!

- **Resource:** Northern CA Center for Well Being
- **Resource:** Kaiser Permanente (members only)
- **Resource:** St. Joseph’s Health
- **Resource:** Sutter Pacific Medical Foundation
Incentives

Offer incentives to boost morale and keep employees motivated to participate in your worksite wellness program. The following are examples of possible incentives:

**Free or Low Cost Incentives**
- Have supervisors promote exercise during the day with motivational messages
- Provide certificates, award ceremonies, newsletter “spotlights,” recognition on the company website
- Include exercise time as part of professional development
- Offer organization-sponsored “special” events that employees will be eligible to attend during work hours
- Provide healthy snacks at celebrations or staff meetings

**In-Kind Cost Incentives**
- Offer cash rebates, vacation days, or other incentives to employees who can document participation in regular physical activity
- Offer a drawing to win a prize for participating in a worksite wellness program Raffle items can be material or non-material prizes, such as a gift certificate or the ability to leave work 30 minutes early on Friday

**Direct Cost Incentives**
- Provide subsidized health club memberships or discounts to local gyms
- Provide discounts for the purchase of exercise equipment
- Offer parties, picnics, or softball days when group fitness goals are reached
- Offer gifts - such as t-shirts, water bottles, golf equipment, gift certificates, etc. - to those who participate in wellness programs
- Conduct “Big Prize” drawings for those who make small accomplishments regarding their health
- Offer free or low-cost health screenings
- Offer free ergonomic assessments and work space enhancements
- Offer wellness reimbursements for yoga, Pilates, or weight watchers classes
- Provide entertainment of any kind to boost morale. Events serve a purpose in jump-starting, reenergizing, or wrapping up a campaign

**Incentives from the Insurance Company**
- Work with your health insurance provider to offer insurance premium discounts to employees who engage in healthy lifestyles. Premium discounts might include better benefits, monetary incentives
- Charge less for plan contributions (i.e. offer a $200 benefit credit)
- Ask healthcare providers to include preventive services related to physical activity as part of their benefit packages
Employers Pledge

We at {company name} know that our people are our most valuable resource. Therefore, we pledge to enhance the overall health and wellness of employees by improving health and self-esteem through education, resources, and support. We pledge to create a healthy, safe and more enjoyable work environment by providing employees access to the tools and information necessary.

Worksite Coordinator Signature       Date

Administrator Signature             Date

Source: Northern California Center for Well-Being, www.norcalwellbeing.org
Employees Pledge

I understand that my health is one of my greatest assets. Therefore, I make this pledge for myself knowing that my choices affect my well-being, my co-workers, my family and friends.

I pledge to:
• Commit to my own health every day
• Establish reasonable goals to enhance my health and well-being
• Have a healthy approach toward food and eating
• Make exercise a regular and enjoyable part of my life
• Seek and nurture meaningful relationships
• Strive to cut out unnecessary risks and bad health habits
• Have a medical check-up annually
• Make time for what’s important, and reduce unnecessary stress
• Be supportive of others in their quests for wellness
• Live a life of healthy moderation
• Be patient and forgiving when I experience set-backs
• Find ways to recreate and find joy in life

Employee Signature  Date

Source: Northern California Center for Well-Being, www.norcalwellbeing.org
STEP 9 – MAINTAIN ADHERENCE

RESOURCES INCLUDED IN THIS SECTION:

1. EVALUATION OPTIONS
2. SPEAKER EVALUATION FORM
**STEP 9 – Maintain Adherence**

Besides offering incentives and friendly competition, peer-to-peer support (mentoring) and evaluations are often the best ways to maintain employee participation in wellness programs. Consider using both of these tools as a way of ensuring the success of your worksite wellness program.

**Mentoring**

A mentoring program (or “buddy system”) allows employees to rely on each other for support. A mentor can encourage healthy eating and physical activity in the workplace. They can also offer assistance to employees who want support or are having difficulty adhering to a policy.

**Evaluation**

Evaluations can help you determine what programs are being used and which ones are not. They can also measure whether employee’s attitudes, behaviors, and health indicators have changed as a result of the program. All of this information can be used to modify the program in order to better meet employee needs or ensure that the program is working effectively.

How to Evaluate: It’s important to plan how the program will be evaluated when setting up a wellness program. Review on the website the Wellness Council of America’s: [Planning Wellness: Getting Off To A Good Start](#). The guide provides information on how to develop a program evaluation as well as how to use evaluation results to benefit your program.

See next page for sample of evaluation options.
Evaluation Options

**Participant Feedback**

Have employees complete an evaluation form at the end of each wellness presentation (i.e. speaker, workshop or event). Use the data to determine how useful the presentations are and how they might be improved.

**Health Status Questionnaire**

Conduct an annual health status questionnaire. Use the information to track changes in behavior and risk factors. The data will help you determine how effective your program may be at improving overall health. The data can also help you develop policies or programs to address new issues.

**Wellness Objectives Evaluation**

Evaluate each of the wellness objectives that your wellness team or coordinator developed. For example, let’s say one of your objectives was to have 60% of the organization workforce participate in one or more wellness program activities during the year. What percentage participated at the end of your first year? By evaluating each objective, you can determine what programs and policies are doing well, which need to be modified, and which need to be cut.

**Employee Satisfaction**

Measuring employee satisfaction of your worksite wellness program is one of the simplest ways to evaluate your program. The information you learn can give you a general idea about who is participating and what components are the most popular. At the basic level, collecting employee satisfaction data includes the following:

- Tracking the number of employees enrolled and participating in the program
- Tracking the number of hits to the worksite wellness section of your website
- Conduct observations or counts (i.e. track number walking at noon)
- Conducting participant satisfaction survey, focus groups, or interviews
- Tracking policy or environmental changes (i.e. conducting a Worksite Health Access Survey every year and comparing the results to past surveys)
Outcome Evaluation

Outcome evaluations are a bit more complicated than other forms of evaluation because they take more work to gather the information. Outcome evaluations include the following:

- Pre- and post- surveys measuring changes in attitudes, knowledge, and current eating and physical activity habits
- Tracking the sale of vending machine items (arrange with vendor to track selections)
- Tracking the sale of cafeteria menu items
- Comparing aggregate data from company health screenings (i.e. blood pressure, cholesterol, body weight, BMI) conducted before and after a wellness program was implemented
- Tracking corporate healthcare costs and return on investment

Organizational Indicators

Organizational indicators should be tracked over time. These include the following:

- Number of employees participating in wellness activities
- Number of worker compensation claims filed
- Number of lost work days due to work-related injuries
- Number of sick days per period of time
- Number of disability days per period of time
- Number of occupational injuries per 1,000 employee work days
- Number of early medical retirements per period of time
- Number of terminations for health reasons
- Per capita health benefit claims cost
- Per capita worker compensation cost
- Per capita sick leave absenteeism cost
- Per capita disability claims cost

Source: Northern California Center for Well-Being, www.norcalwellbeing.org
## Speaker Evaluation Form

**Name of Brownbag class:**

**Date:**

**Speaker:**

Your comments and suggestions will be reviewed and considered for future presentations. Please select the description that most closely represents your experience of this workshop, class series, or activity.

### Please rate speaker and provide any comments:

<table>
<thead>
<tr>
<th>Speaker Questions</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Speaker’s knowledge of subject</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Speaker’s delivery of material</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I would like to attend another class taught by this speaker</td>
<td>Unsure</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>4. Comments:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Please rate the course and provide any comments:

<table>
<thead>
<tr>
<th>General Questions</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Overall Evaluation of workshop/class/activity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. The class met my expectations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. The class met the stated objectives</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. There was enough time to cover the material presented</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Questions were answered to my satisfaction</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. The handouts were a useful addition to the class</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. The location was convenient</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. The room was comfortable for the activity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Activities (if any) added to my learning</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Do you intend to change any of your personal behavior as the result of the workshop or activity?</td>
<td>Unsure</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

If you checked yes, check all that apply below:

- Increase physical activity
- Improve Diet
- Lose Weight
- Practice stress reduction
- Improve Communication
- Other (please describe)

<table>
<thead>
<tr>
<th>Other (please describe)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**11. Comments:**

**12. Suggested topics for future classes:**

**Your Name (optional)**

Source: Northern California Center for Well-Being, www.norcalwellbeing.org
ADDITIONAL RESOURCES

Topics listed in this section:

1. Return on Investment Information
2. Workforce Wellness Information
3. Sample Workforce Wellness Programs
4. Workforce Wellness Toolkits & Guides
5. Worksite Wellness Contractors (Sonoma County)
6. Assessment Tools
7. Wellness Goals & Objectives
8. Policy Design & Implementation
9. Employee Buy-In
10. Evaluation
11. Newsletters & Books
12. Conference Trainings & Opportunities
13. Professional Organizations
Return on Investment Information

- Return on Investment (Prevent Disease)
  http://www.preventdisease.com/worksite_wellness/worksite_wellness.shtml

Worksite Wellness Information

- The Wellness Councils of America www.welcoa.org
  - Free Resources www.welcoa/freeresources
- Healthier Worksite Initiative (CDC) www.cdc.gov/nccdphp/dnpa/hwi/index.htm
- Environmental Nutrition and Activity Community Tool (ENACT) – Workplace Strategies
- National Wellness Institute: Offers articles and membership services www.nationalwellness.org
- Sample Worksite Wellness Programs: What Corporations are Doing (Partnership for Prevention)
  http://www.prevent.org/data/files/initiatives/lbe_profile_sheets.pdf
- Wellness Junction: Offers free email newsletters and reports on wellness management
  www.wellnessjunction.com
- Leading by Example: Leading Practices for Employee Health Management (Partnership for Prevention)
  http://www.prevent.org/initiatives/leading-by-example.aspx

Sample Worksite Wellness Programs

- Be Active! Worksite Program (California 5 A Day)
- California Fit Business (Network for a Healthy California)
- Active for Life –American Cancer Society – 10 week employee wellness program
  https://www.activeforlife.org/
- Sample Worksite Wellness Programs: What Corporations are Doing (Partnership for Prevention)
  http://www.prevent.org/data/files/initiatives/lbe_profile_sheets.pdf
Worksite Wellness Toolkits & Guides

- Planning Wellness: Getting off to a Good Start (Wellness Council of America)
  Part 1 - [http://www.ndworksitewellness.org/docs/step4-planning-wellness-programs-part%201.pdf](http://www.ndworksitewellness.org/docs/step4-planning-wellness-programs-part%201.pdf)

Worksite Wellness Contractors (Sonoma County)

- Kaiser Permanente, Health Works Program (for businesses with 300 or more employees) [www.kaiserpermanente.org](http://www.kaiserpermanente.org)
- Northern California Center for Well-Being (Healthy Business/ Corporate Wellness Program) [www.norcalwellbeing.org](http://www.norcalwellbeing.org)

Assessment Tools

- Free Assessment Tools
  - Sample Needs & Interest Survey (Health Alliance Plan of Michigan) [https://www.hap.org/employers/worksite/pdfs/sample_employee_interest_survey.pdf](https://www.hap.org/employers/worksite/pdfs/sample_employee_interest_survey.pdf)
- Fee-Based Employee Health Risk Assessment
  - Onlife Health [https://www.onlifehealth.com/](https://www.onlifehealth.com/)
  - Kersh Wellness [https://kershhealth.com/](https://kershhealth.com/)
  - WELCOA (Wellness Councils of America) [http://www.welcoa.org/](http://www.welcoa.org/)

Wellness Goals & Objectives

Program Design & Implementation

- **A Guide to Writing and Implementing a Physical Activity Policy in the Workplace** (Canada’s Division of Nutrition and Physical Activity, National Center for Chronic Disease Prevention and Health Promotion)
  

Walking Programs

- Walking Program Toolkit for the Workplace (Get Healthy Washoe)
  

- Guide to Establishing a Worksite Walking Club (California Fit Business Kit)
  

Promoting Stair Use

- **Take the Stairs: A Worksite Wellness Activity Toolkit** (Montclair Department of Health and Human Services)
  
  [http://www.eatplaylivebetter.org/pdf/Take_the_Stairs_Toolkit.pdf](http://www.eatplaylivebetter.org/pdf/Take_the_Stairs_Toolkit.pdf)

- **Guide to Improving Worksite Stairwells**
  

Smoke-Free Workplace

- Tobacco-free Workplace Tool Kit (American Cancer Society)
  

- Northern California Center for Well-Being – Smoking cessation classes offered at the Center or at the worksite of Santa Rosa businesses [www.norcalwellbeing.org](http://www.norcalwellbeing.org)

Healthy Food

- Vending Machine Standards (CA Fit Business Kit)
  

- Guide to Starting a Worksite Farmer’s Market (CA Fit Business Kit)
  

Health Awareness

- Educational materials available from American Institute of Preventive Medicine
  

- National Health Information Clearinghouse – National health observances year at a glance
  

- Diabetes basics from the American Diabetes Association
  

- College of Sports Medicine - Exercise guidelines, tips for meeting guidelines, and how to start an exercise program
  
• National Heart and Lung Blood Institute - Educational campaigns, menu planners, recipes for heart health, and information for Latinos and African American
http://www.nhlbi.nih.gov/index.htm

Lactation Accommodation
• Breastfeeding Toolkit (Center for Prevention and Health Services, National Business Group on Health)
http://businessgrouphealth.org/healthtopics/breastfeeding/docs/BF_entire_toolkit_FINAL.pdf
• Breastfeeding and Healthy Living: Going Back to Work
http://www.cdph.ca.gov/HealthInfo/healthyliving/childfamily/Pages/GoingBacktoWorkorSchool.aspx#employers
• Supporting Breastfeeding in the Workplace (CDC)

Employee Buy-In
• Take Action Kick Off Event (California 5 A Day) http://www.takeactionca.cdph.ca.gov/
• Incentives for Workplace Wellness Programs (RAND Corporation)
http://www.rand.org/content/dam/rand/pubs/research_briefs/RB9800/RR9842/RAND_RB9842.pdf

Evaluation
• Carefully Evaluating Outcomes (Wellness Council of America)

Newsletters & Books
• American Journal of Health Promotion: An excellent bi-monthly professional peer review journal for health promotion professionals $99.50 subscription per year
http://www.healthpromotionjournal.com/
• Health Promotion Practitioner: A very practical monthly newsletter for health promotion professionals published by Health Enhancement Systems that also provide excellent short term incentive programs http://www.hesonline.com/employee-wellness-products/health-promotion-practitioner
• Parlay International: Offers reproducible materials covering a wide range of health promotion and wellness topics http://www.parlay.com/c-3-general-health.aspx
• Krames Communication: Publishes patient education, health promotion, safety, disease management, safety and wellness education resources
https://www.kramesstore.com/OA_HTML/ibeHome_kra.jsp?minisite=10002
• Whole Person Associates, Inc.: Materials and resources on mental aspects of wellness including use of humor http://www.wholeperson.com/
Conferences and Training Opportunities

- **World Congress**: Convenes senior executives from all segments of the health industry and government to health care conferences to formulate health solutions  
- **American Journal of Health Promotion (AJHP) Annual Conference**:  
- **National Wellness Conference**: Sponsors a conference for individuals seeking professional development and personal renewal  
- **Institute for Health and Productivity Management**: Offers training opportunities, publications, and international conferences  

Professional Organizations

- **National Business Group on Health**: Non-profit organization that represents large employers' perspective on national health policy issues  
  [http://www.businessgrouphealth.org/](http://www.businessgrouphealth.org/)
- **Women's Health Professional**:  
  [http://womenshealthpro.wordpress.com/about/](http://womenshealthpro.wordpress.com/about/)