

Step 2: Planning and Assessing

Planning is an essential step of any worksite wellness program. The planning process helps to gain support and to create a program that is both meaningful and lasting.

One of the first steps is to create a wellness committee to help guide the process. Members of the Wellness Committee should represent the many different aspects of your company, from management and safety to human resources and facilities. The size of your committee will depend on the size of your company, and quite possibly the scope of your program. If your company has a small number of employees, consider having your Champion work directly with the owner or owners to engage employees.

One of the initial tasks of the Wellness Committee is to make the employees aware of the *2008 Physical Activity Guidelines* and the amount of physical activity each individual should strive for each week. It is important to keep the guidelines at the forefront of the program as you develop your physical activity programs.

A Wellness Committee should:

- provide guidance to the worksite health program.
- represent your employees and your employees' interests as you create your wellness programs.
- include employees from across the company.
- include employees who work in the field or in satellite locations.
- meet on a regular basis.

For more information on the creation of Wellness Committees, see *The Saving Dollars and Making Sense Committee Guide from North Carolina's Eat Smart Move More* program: http://www.eatsmartmovemorenc.com/Worksites/Toolkit/WsTk_Committee.html.

Examples of Wellness Committee Members

Human resources specialist.

Employee nurse.

Union Leadership.

Legal Representative.

Executive Leadership.

Marketing Personnel.

Interested Staff.

Facilities Representative.

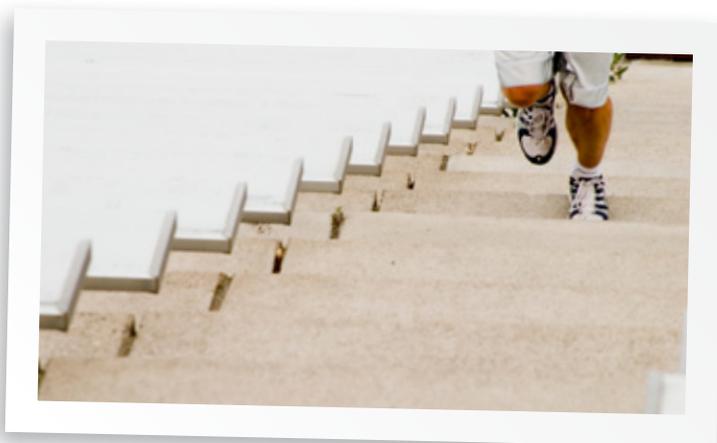
Assessing Needs

An assessment is a way to collect information that can help measure skills, knowledge, beliefs, or attitudes. Assessments can provide input on how to approach a new program or strengthen pre-existing programs. These come in various forms, from questionnaires to surveys to focus groups. Assessments can also measure policy, organizational, and environmental changes that you may implement as part of your physical activity program.



It is important to consider assessing the needs and interests of your employees when beginning a physical activity program. By assessing their needs and interests, you will have a better understanding about what your employees currently do to be physically active and in what types of programs they may be interested.

In addition, assessments can help provide a baseline with which you can evaluate your program. These types of assessments can help measure your program's progress over time. For instance, in the first year, employees who participated averaged 15 minutes per lunch hour of activity and by the 3rd year, the average was up to 30 minutes per lunch hour.



When thinking about physical activity programs, it is important to conduct one or more assessments to make sure feedback is obtained from a wide variety of sources.

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Assessments can measure and identify:

- Baseline data necessary for evaluation purposes.
- The feasibility of starting a wellness program at a given workplace.
- Support for a wellness program at various levels of the organization.
- Employee needs and interests.
- How company policies support or present obstacles to healthy lifestyles.
- Features of the workplace environment that support or present obstacles to healthy lifestyles.
- Cultural aspects of the organization that could affect the program.
- Internal and external resources available for program planning and implementation.
- Current employee lifestyle behaviors.
- Medical care costs.
- Productivity costs.
- Priorities for financial and other resources.

The information gained from assessments can serve as a baseline for the remainder of the steps. In addition, they provide data to be able to use in the evaluation of the program or activities. For more assessment tools, see the **Resources** section of this guide.

Assessment responsibilities of your wellness committee may include:

- Evaluating the current wellness programs.
- Assessing company policies.
- Assessing company practices.
- Assessing employee needs and preferences.
- Assisting in implementing, monitoring, and evaluating activities.

For more information, visit <http://www.cdc.gov/nccdphp/dnpao/hwi/programdesign/index.htm#Assessment>

Michigan's Healthy Workplaces Resource Guide also provides examples of several assessment tools: http://www.michigan.gov/documents/mdch/WorksiteWellnessWeb4_281713_7.pdf

The assessments below can help you evaluate your workforce and workplace. Although only a sampling of the types of assessments is available, they can provide baseline data to help with planning and evaluation and provide insight into your colleagues' views about incorporating physical activity in the workplace.

- **Health Risk Appraisal (HRA):** A Health Risk Appraisal is a way to collect information from your employees to identify specific health risk factors. These may include weight, body mass index (BMI), blood pressure, cholesterol, and other potentially adverse health conditions that may limit participation in physical activity programs. There are several types of HRAs that collect different types of information. Specify the sort of information you want to collect and how you plan to use this information. Engage your human resources department when using an HRA to ensure the information you collect is kept confidential and does not raise ethical issues. The CDC provides a comprehensive overview of HRAs and how to find an HRA that is right for your company: http://www.cdc.gov/nccdphp/dnpao/hwi/programdesign/health_risk_appraisals.htm
- **Employee Needs and Interests Survey:** This survey helps determine what wellness programs employees may be interested in, what health information employees would like to receive, and how likely an employee would be to participate in worksite programs or services. A survey to assess employees' current levels of physical activity and possible workplace activities is included in *Tools and Templates*. A broader employee wellness survey can be accessed at: http://www.welcoa.org/freeresources/pdf/ni_survey.pdf
- **Walkability Assessment:** This assessment helps determine how walkable a location is by evaluating several factors. It can help plan or strengthen a walking program, one of the easier physical activity programs to implement. It is important to look at this assessment early in the planning process if your company is new to walking programs.
<http://www.cdc.gov/nccdphp/dnpao/hwi/toolkits/walkability/index.htm>
<http://www.nhtsa.gov/people/injury/pedbimot/ped/walkingchecklist.pdf>
<http://www.unc.edu/~jemery/WABSA/index.htm>

In addition to the walkability assessment, your company may choose to develop its own walking maps of an area. This resource helps promote walking trails and encourages employees to move more.

<http://www.eatsmartmovemorenc.com/WalkingMapGuide/WalkingMapGuide.html>

- **Environmental Audits:** The physical work environment provides opportunities for employees to practice healthy behaviors, such as physical activity, or can discourage unhealthy behaviors, such as using tobacco products. Employers can assess how well their worksites enable employee health by using environmental audit tools to assess the physical features of the workplace. When you are selecting an environmental audit tool, recognize that they may be narrow or broad, and you can customize an audit tool to meet your needs. In addition, you can review other local worksite programs and buildings for ideas on how to improve your facility. CDC has links to several different environmental audits: http://www.cdc.gov/nccdphp/dnpao/hwi/programdesign/environmental_audits.htm

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Reviewing Company Policies

As you plan or expand your wellness programs, it is important to review existing corporate policies, procedures, and guidelines to ensure that they do not hinder physical activity in the workplace. The review may include human resources, facilities management, or legal policies and procedures.

Changing policies is not an easy task. Making changes will take time and resources. It is essential to work with employees throughout the company to determine what works best and how best to proceed. A questionnaire to help guide this process can be found in the *Tool and Templates* section.

Reviewing Company Practices

The results of a policy review can lead your wellness committee to recommend changes to make the worksite more supportive of physical activity.

Policies that May Promote Physical Activity:

- Allowing employees to use paid time (not lunch or breaks) to be active during the workday.
- Allowing employees to use flex time. This means starting earlier or later than the typical workday or permitting employees to work longer hours on some days to allow for additional time off later.
- Allowing for incentives or rewards for employees who are physically active.

Policies that May Hinder Physical Activity:

- Requiring a strict dress code policy.
- Mandating employees to be on-site at all times.
- Scheduling mandatory meetings during the lunch hour.



It is also a good idea to assess the physical setting(s) of your business. Some specific areas include:

- Availability of changing rooms, lockers, or showers.
- Installation and location of bike racks.
- Opening the stairwells.
- Dedicated space for physical activity.



The checklist in the *Tools and Templates* section can help determine what company practices are already in place. Be sure to complete one for each company worksite. If you are interested in broader assessment of comprehensive wellness practices, consider completing a Worksite Wellness Index. For more information on Worksite Wellness Indexes, please see the *Resources* section of this guide. www.dshs.state.tx.us/wellness/resource/wwibody.pdf

Reviewing Other Information

If your company has a human resources department, check with them to see if there is additional information from other sources that may be useful in developing and evaluating your physical activity and wellness program. Examples of existing data might include:

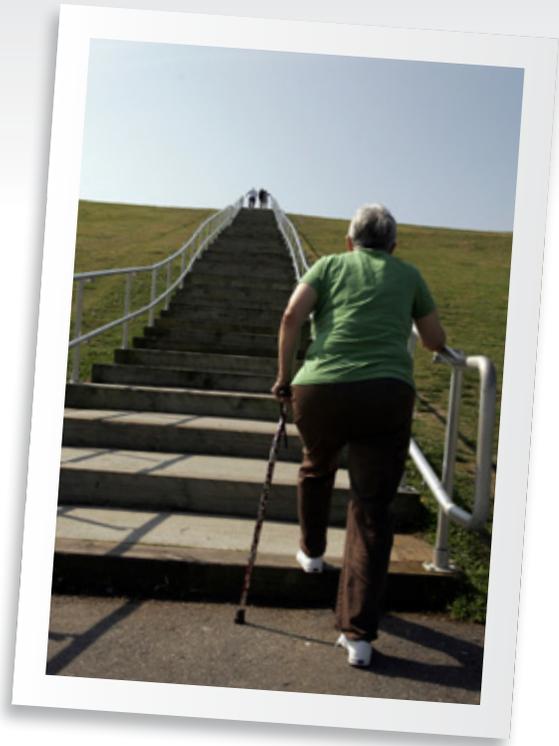
- Demographic data about your employees.
- Absenteeism rates.
- Employee satisfaction data.
- Workers compensation claims.
- Health claims and prescription claims data.

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Planning for Physical Activity

At this point you have completed some sort of assessment: employee needs, organizational practices, or organizational policies. Have your Wellness Committee refer to the questions below or develop new questions as your company determines what action steps are most appropriate for your worksite.

- What practices do we have now that we want to expand or improve? What policies need to be revised to allow employees to be more physically active? What do employees want and how can we accommodate their needs and requests?
- What can we reasonably provide to employees? Information? A walking path? A fitness room? Bike storage? Showers?
- How can we make the best use of existing space? Could we improve the stairwells or use an empty room for fitness equipment?
- How can we better use community resources? Can we partner with a fitness center for reduced membership fees? Are there facilities in the community our employees can use?
- Could we include physical activity in existing company events or meetings, such as a company picnic or retreat?



These questions will help guide the process of generating ideas for what can be done to increase physical activity in your workplace. From here, your wellness committee will be able to narrow down the scope of the program. For more on planning resources, visit http://www.cdc.gov/nccdphp/dnpao/hwi/programdesign/planning_resources.htm

Deciding What To Do

With all the information, it is time to decide what to do. If you have created a Wellness Committee, have them generate a list of possible strategies to increase physical activity among employees. List them on the Planning Worksheet, included in the *Tools and Templates* section. Have each committee member comment on the recommended strategies based on the following criteria:

- Importance – How important is it to use the recommended strategy?
- Cost – How expensive will it be?
- Time – How much time and effort will it take?
- Commitment – How enthusiastic will employees be about participating in it?
- Reach – How many employees will be affected?

Lead a discussion around each strategy on the basis of the five criteria and rank which ones would be most feasible to implement within your company. Use these as a basis for recommendations to your champion.

Budgeting

Physical activity programs take resources. These programs do not need to be expensive, but some resources should be devoted to the effort.

There are certain expenses that need to be considered when developing a program:

- Staff Time – This depends on how large your program is and how many employees are on the Wellness Committee. Some companies have full- or part-time wellness coordinators.
- Promotional Costs – These costs are for the promotion of the program to your employees. These may include the cost of items to make employees aware of the program, such as flyers or posters. For more information on marketing the physical activity program to your employees, see **Step 3: Promoting**.
- Administrative Costs – These costs are associated with each initiative you implement. There are a variety of costs that may be associated with an activity, including facility updates or space rental.



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- Incentive Costs – These are the investments that the company makes to encourage employee participation, including branded water bottles, fitness gear, paid time off, and possible reductions to insurance premiums. For more information on incentives, see **Step 3: Promoting**.

You may also want to have a separate budget for larger expenses, such as Health Risk Appraisals, wellness screenings or health insurance premium reductions, because these can be considerably more expensive than water bottles or pedometers.

Cost per employee and cost per participant are two ways to approach budgeting for a program. For cost per employee, factor all company employees into the cost of the program. This is the easiest way to begin budgeting for a new program, as it allows all to participate. It also provides a budget baseline from which you can begin.



Later you can decide if it would be more appropriate to budget each activity on a per participant basis. This approach allows you to narrow your budget to those who participate and to be more prudent with your spending.

The actual costs will vary depending on the resources available and who is actually going to pay. Some employers pay all costs associated with the program, others have employees pay a portion or all of the costs. In general, the more you invest, the greater the potential impact and return.

A budgeting worksheet is included in the **Tools and Templates** section. For more information on budgeting, please see the following Web site:

http://infopoint.welcoa.org/blueprints/blueprint1/publications/wi_budget.html

Developing a Time Line

Time lines fall into short-term and long-term categories. Short-term time lines focus on individual projects whereas long-term time lines look at the larger picture of the entire program. Long-term time lines may include many short-term time lines. If only one or two events are planned, the time line will be short and simple. However, a more comprehensive approach may take between 6 and 12 months. An example is provided below.

Stage 1: Gain leadership support. (1–3 months)

Stage 2: Begin the assessment process. (3–6 months)

Stage 3: Look at the assessment information. (1 month)

Stage 4: Initial implementation. (8–12 months)

Stage 5: Evaluation. (Ongoing)

Some of the activities may overlap other activities. An example of a time line is provided in the *Tools and Templates* section.

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Special Circumstances

There are several special work circumstances that wellness committees should consider when planning physical activity programs:

- Weather conditions.
- Shift work.
- Decentralized or multiple locations.
- Active jobs.

Weather Conditions

When planning physical activity programs, be aware of your surroundings and the weather. Weather can both encourage and discourage people from doing physical activities. A warm spring morning or brisk autumn afternoon may entice some to take part in a walk and talk meeting, but rain, snow, and extreme heat or cold can inhibit individuals from going outside.

When planning physical activity competitions or encouraging employees to increase their activity level, be aware of the weather and how it may affect participation, as well as the physical effects it has on individuals. Consider your region's climate as well. Some areas of the United States are prone to extreme heat or cold more than others. However, a heat wave or deep freeze can affect almost all regions and put a damper on planned events.

When planning a single or multiple day event that takes place outdoors, have a contingency plan in place should weather threaten your activities. Be sure to monitor employee activities carefully when holding an event. Heat-related injuries, including heat exhaustion, heat stroke, and dehydration, can happen when weather may not be considered severely hot. Be certain to have enough water on hand for all participants to keep them hydrated throughout the event. Likewise, extended exposure to cold temperatures that are not below freezing can still lead to hypothermia and other cold-related injuries. Ensure someone from your Wellness Committee is trained in CPR and first aid to monitor for signs of heat- or cold-related injuries.

If you have an outside worksite where employees perform physical labor, be sure to educate your employees about how to monitor for signs of heat- or cold-related injuries, so they can monitor themselves and others. Provide ample time for breaks to either cool down or warm up and provide appropriate beverages to keep employees hydrated.

Shift Work

Not all work is accomplished during a 9–5 shift. If your company requires multiple shifts, it is important to ensure that all employees are afforded opportunities to be physically active and participate in wellness programs, no matter what time they work. For example, it may not be prudent for employees to go for walks outside during breaks or have walking meetings outside at night. Think about ways to use your buildings' resources to get employees moving, including tracking distances of hallways and encouraging stair usage. Consider physical activity competitions that encourage employees to record activity performed outside of work, to ensure overnight employees can participate. If you offer fitness center memberships or discounts, look for 24-hour centers.

Decentralized or Multiple Locations

When planning your programs, consider where your employees work. Not all worksites contain all employees. In fact, it is more and more common to find businesses of all sizes spread across multiple locations. Be certain to include all work

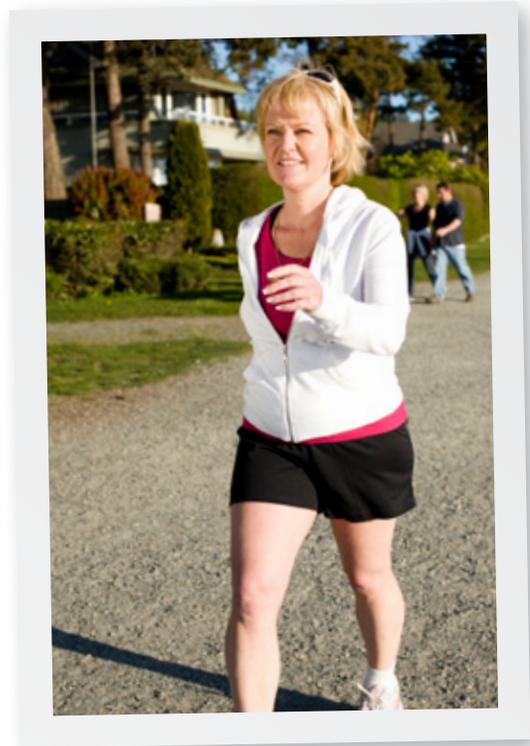


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locations and employees. If you establish a fitness center at headquarters, be sure to offer similar equipment in other locations, or at least subsidize fitness center memberships for those located elsewhere. Ensure that information from lunch and learn programs is shared through intranet, wellness pages, or e-mail for easy access by all employees.

Think of how to use multiple locations as a way to foster interest in physical activity through interoffice competitions. Have each location create their own wellness committee and encourage them to create their own programs. Walking clubs may not be effective in offices located in the North during the winter months, but may be very possible for locations in the South and Southwest. Create programs that encourage the different offices to compete against each other. If the company is able to come together occasionally during the year (for business meetings or retreats), find ways to foster the inter-office programs and recognize individuals and teams from all locations.

Consider ways to engage individuals who telecommute. Develop walking programs or physical activity challenges that individuals can do that allow them to record their results. If you have many staff who telecommute or work remotely, set aside a specific time of the day or week to encourage them to get away from their computers or phones and participate in different physical activities. Although they may not be physically together as they do their physical activities, it can create a sense of camaraderie in that they are all doing it at the same time. Consider facilitating a call after the dedicated time to find out who did what during their physical activity break.



Active Jobs: Balancing Physical Fitness for Active Employees

Some employees are active because of the physical nature of the work they perform. Restaurant wait staff may walk several miles in the course of a shift, and construction workers may lift hundreds of pounds of material over the course of a day. However, an active job does not guarantee that the employees will be able to get the moderate- to vigorous-level aerobic and muscle-strengthening activities they need to meet the recommended guidelines.

Consider developing programs for your employees that build upon the types of physical work they perform and that help them increase their fitness levels to meet the recommended levels of activity. Ensure it balances the need to perform muscle strengthening activities for all major muscle groups with the amount of aerobic activity they need. Also ensure that employees who engage in physical work know how to do their work safely, reducing the likelihood of injury.

In this step...

- A champion helps create the wellness committee and supports their efforts in assessing and planning for physical activity programs in the workplace.
- The wellness committee is formed and conducts assessments to determine what types of activities can be done in the workplace. They create their plan, budget, and time line on the basis of their assessments.

One Step at a Time: Gwinnett Medical Center Adapts to Ensure Physical Activity

As a hospital and medical facility, the Gwinnett Medical Center plays a very important role in its community's health. It provides necessary emergency and medical care 24 hours a day, 7 days a week in the North Atlanta metro area.

To ensure that those who care for the community are cared for themselves, the Gwinnett Medical Center

has taken many actions to ensure all of its employees have the opportunity to be physically active, no matter what shift they may work. To support those who have to be on their feet 8 hours or more a day, fitness classes

were developed and offered in a conference room several times a week. Employees could buy into the classes for a minimal fee to support the cost of the trainers, and the fee was set up as a payroll deduction to make it easier to participate. Pilates, Tai Chi, yoga and aerobics classes are offered, with new classes being offered on the basis of employee interest and trainer availability.

“Being open 24 hours a day, 365 days a year requires a different approach to worksite physical activity than a traditional 9-5 office,” says Tim Gustavson, Health

Education Specialist at Gwinnett Medical Center. “When creating our wellness programs, we took into consideration those who work overnight shifts as well as the type of work they do.”

Because trainers may not be available for overnight shifts, Tim and his colleagues found creative ways to offer physical activities to all. They opened the



stairwells and provided signage promoting the use of stairs to go between floors. They painted a central hallway to be more appealing and relocated employee bulletin boards to the hall to encourage staff to walk more. The Medical Center's campus has a series of trails throughout, which connect

buildings and adds additional distance to the walk. They also actively promote using “walk and talk” meetings — encouraging meetings that can take place while on the move, be it inside the Center using the hallway or outside using the trails.

The small changes have made a difference. “We have heard from our colleagues that they are moving more, no matter what shift they may work,” said Tim. “By taking small steps, we can make great changes.”