Winning at Wellness
How to Develop a Successful Workplace Wellness Program
What’s Inside

Introduction .................................................................................................................. 3
Why focus on the workplace? ......................................................................................... 3

Where to Begin ................................................................................................................. 4
Gain Leadership Support ............................................................................................... 4
Identify a Program Coordinator ...................................................................................... 6
Develop a Wellness Committee ....................................................................................... 6
Create a Mission Statement ............................................................................................ 8
Develop Goals and Objectives ......................................................................................... 8
Establish a Budget ........................................................................................................... 11

What’s Next ..................................................................................................................... 12
Create a Culture of Health ............................................................................................... 12
Establish the Elements of Your Wellness Program ....................................................... 13
Write and Follow a Planning Checklist ........................................................................... 14
Select Wellness Activities ............................................................................................... 14
Wellness Activity Suggestions ......................................................................................... 14

Engaging Employees ....................................................................................................... 16
Survey Employee Interests ............................................................................................. 16
Motivate Your Employees to Succeed ............................................................................. 16
Use Incentives to Encourage Participation .................................................................. 17
Develop an Evaluation Plan ............................................................................................ 18
Tap into Wellness Resources ......................................................................................... 19

Understanding Laws: Wellness Programs and Incentives ............................................. 20
Participatory vs. Health Contingent Wellness Programs ................................................ 20
Requirements for Health Contingent Wellness Programs .............................................. 21

Appendix I: Sample Forms ............................................................................................. 23
Use of a Medical Consent Form ...................................................................................... 23
Medical Consent Form .................................................................................................... 23
Committee Member Commitment Form ........................................................................... 24

Appendix II: Sample Surveys .......................................................................................... 25
Wellness Interest Survey ................................................................................................ 25
Program Evaluation Survey ............................................................................................. 29

Appendix III: Sample Worksheets .................................................................................. 30
Budget Worksheet ........................................................................................................... 30
Wellness Event and Program Planning Checklist ........................................................... 31

Appendix IV: Health Fair Planning Guide ....................................................................... 32
Timeline .......................................................................................................................... 33
Vendor Invitation Letter .................................................................................................. 35
Vendor Participation Form ............................................................................................... 36
Vendor Confirmation Letter ............................................................................................ 37

Appendix V: Programs We Offer ..................................................................................... 38
Encourage Active Employees ......................................................................................... 38

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Introduction

One of the most effective long-term ways to manage the rising costs of healthcare is to encourage employees to practice good health habits. Practicing healthier habits can promote disease prevention, boost productivity, and enhance employee well-being. Long term, healthier and happier employees can lead to reduced healthcare costs.

One of the ways many companies are helping employees adopt healthier habits is by implementing wellness programs. Wellness programs typically consist of prevention-based education, activities, resources, and tools that address risk factors for many chronic conditions, including diabetes, heart problems, and many cancers. When you also include environmental support, policies that support healthy behaviors, leadership engagement, and employee buy-in, you will see the overall culture shift to one that fosters health. This will be crucial to long term success.

The leading causes of death in the United States include heart attack, stroke, and cancer. However, the actual causes are risk factors, many of which can be modified. According to a 2011 World Health Organization report, smoking is noted as the leading preventable cause of death. Poor diet and physical inactivity are close seconds. These two are predicted to replace smoking as the leading actual cause of death in the near future. Interventions, such as smoking cessation programs and programs to improve diet and increase physical activity, should be much higher priorities for all of us.

Why focus on the workplace?

Most adults spend more of their waking time at work than anywhere else, making it a great site for promoting healthful habits. Culture and environment are powerful influences on behavior, which can be used to help individuals adopt healthier lifestyles. When the culture and environment promote healthy choices, employees are more likely to make healthy decisions and encourage others to do so.

When employees engage in their health, they can benefit from:

- weight reduction
- improved fitness
- lowered levels of stress
- increased sense of well-being
- tobacco cessation
- reduction of health risks and/or conditions
- peak work performance

When organizations engage in promoting health and wellness in the workplace, the benefits can include:

- decreased rates of illness, injuries, and absenteeism
- increased productivity
- improved employee relations and morale
- reduced healthcare costs
- easier recruitment and retention of healthier employees

The purpose of this guide is to help you set up a workplace wellness program in your organization.

Key Elements to Successful Wellness Program Implementation

Research demonstrates that successful wellness programs have several common key elements that result in an engaged workforce and positive health outcomes. The following will illustrate those key elements and provide ideas on how to implement and cultivate each aspect to enhance your wellness efforts.

Gain Leadership Support

Oftentimes wellness programs start with grassroots efforts by those employees who are passionate about wellness themselves. However, the approval and support from leadership will guarantee your wellness initiatives have a long-term, sustainable effect on your organization.

Leadership support is critical for several reasons:

- Leadership can influence the success of the program by making it an organizational priority rather than just another campaign.
- A wellness program is a long-term commitment and should be a part of the organization’s strategic goals.
- A wellness program may require policy changes or a shift in your organization’s culture that will need leadership support.
- A wellness program may require financial support that will only be allocated with engaged leaders on board.

Depending on the size and culture of your organization, begin by starting a discussion around the benefits of worksite wellness with your CEO, CFO, human resources director, or benefits administrator. In order to help prepare for these types of discussions, consider these questions:

**Why does worksite wellness make sound business sense?** Be prepared to support the business case for the wellness program (for example, research the benefits associated with improved productivity and morale, healthcare cost reductions, decreased absenteeism). If necessary, start small by first getting approval to research how a program might work at your company, then use the research to write a more formal proposal for management consideration. Your formal proposal should include: an executive summary, history, current state, proposed future state, budget recommendations, committee involvement, and timeline.

In addition to this guide, our knowledgeable wellness consultants can provide guidance and best practices in the following areas:

- **Gaining leadership support and establishing a culture of health**
- **Collaboration with key stakeholders to develop a strategic wellness plan**
- **Development of a wellness committee and ongoing support**
- **Goals and objectives around population health management (including metrics)**
- **Strategies to identify individuals’ and populations’ health risks**
- **Identifying programs and services that positively affect health behavior change**
- **Strategies to help individuals engage in their own health**
- **Evaluation and data collection tools with ongoing reporting to key stakeholders**
- **Project planning for phasing in wellness efforts**
- **Incentives, rewards, and recognition**
- **Effective marketing for your preventive health program**
- **Assistance and consulting on worksite policies**
- **Integration of a health plan, community-based programs, and other resources to create a well-rounded program**

For more information, email wellness@pacificsource.com or call (541) 225-2811.
How does your wellness program connect to the long-term and short-term goals of your organization?
When you tie your wellness initiatives to your organization’s goals, you are more likely to have more buy-in and support from your senior leadership. In addition, this association will demonstrate to the employees that your wellness endeavors are an important part of the organization’s business plan.

What are the projected cost and/or budgetary requirements for a successful wellness program at your organization? It’s a good idea to first do research on what resources you currently have to help administer your wellness program. Consider community resources, programs, and services available to you through your health insurer and Employee Assistance Program (EAP) provider, people in your organization with expertise in the areas of fitness, nutrition, stress management, and facilities in your building to hold classes and events.

How will you leverage support from all of key stakeholders? We often think of key stakeholders as leadership, but don’t forget that your mid-level managers will play a key role in how the message of wellness trickles down to the employees. In addition, employees’ thoughts, perceptions, and support will be crucial to program success. Employee engagement will depend on their readiness and willingness for wellness programs.

How do you intend to promote the program? You should understand the best way to reach your employees. Consider multiple media channels for promoting your wellness efforts. Mailers to home, email campaigns, posters, or announcements at staff meetings are great ways to market the wellness initiatives depending on your workforce. Utilize the wellness committee members to be cheerleaders among their colleagues and provide managers program details so they are prepared for questions.

How do you intend to evaluate the program to demonstrate effectiveness? Evaluation of your wellness initiatives will be expected from senior leadership to demonstrate the outcomes of all wellness efforts. Keep in mind that there are many ways to measure wellness outcomes. Expect to measure things such as participation, satisfaction, and behavior change. You will need to have set goals and objectives for each initiative in order to gauge effectiveness. See the Goals and Objectives section to learn more about how to measure program success.

It’s also important to keep in mind that leading by example is one of the most powerful ways to promote a wellness program and see success. Ask or encourage your leadership team to actively promote, participate, and model wellness behaviors.

Making the Case for Workplace Wellness Programs (WELCOA): WELCOA.org/freeresources/pdf/making_the_case0311.pdf
CDC Obesity Trend Graphs: CDC.gov/obesity/data/adult.html
Leading by Example (Partnership for Prevention): Prevent.org/Initiatives/Leading-by-Example.aspx
Capturing CEO Support (WELCOA): WELCOA.org/freeresources/pdf/aaceosupport.pdf
Identify a Program Coordinator

Assign a point person to oversee the program and help ensure its success. The coordinator will make sure all the planning and implementation steps happen. This may include promoting the program, distributing and collecting materials and incentives, and collecting and recording program data. If this is not possible, consider allocating responsibilities through wellness committee members.

When looking for the right person to serve as your lead for wellness promotion, look for someone that is well trusted within the organization—someone who has the time to dedicate to being a lead person. This individual should also be engaging, well-spoken, and one who lives an active and healthy lifestyle themselves, but also understands the complexity behind true, sustainable behavior change. It’s important for this person to acknowledge the sensitive nature of addressing personal health in a workplace setting and one who can maintain confidentiality of such issues.

Develop a Wellness Committee

A wellness committee is vital to the success a worksite wellness program. Wellness committees serve as liaisons between the employee population and key stakeholders. They can also:

- Participate in the development of wellness program goals and objectives.
- Assist in the planning and delivery of the wellness program events and activities.
- Serve as the main route of communication to employees about the value and benefits of the wellness program.
- Encourage participation.
- Advocate for improved worksite policies.
- Assist in the evaluation of program efforts each year.
- Contribute to an evolving wellness culture.
If you think you are ready to form a wellness committee, or if you have one in place, consider the following:

- Do you have representation from all organizational levels (shifts, departments, classifications, etc.)?
- Is it clear to each committee member and their managers what their roles and responsibilities will be?
- Does the committee meet regularly to appropriately plan, implement, and evaluate wellness initiatives?
- Does the committee have a communication plan to educate stakeholders on goals and objectives with quarterly updates?
- Does the size of the committee allow for input and ideas from all members? (The recommended group size is up to you, but limiting it to no more than 15 people is best.)

Furthermore, committee members should be fully aware of what is expected of them. It's recommended to provide written documentation to describe what is expected of them so that they can obtain managerial approval. A sample can be found in Appendix I.

Once the committee members have been chosen, the first few meetings should be dedicated to developing a mission statement, goals, and objectives. If you have collected data through an employee survey, or have aggregate data from a recent health screening, these are great sources for tailoring goals and objectives. However, most grassroots efforts revolve around environmental and cultural changes. Refer to “Creating a Culture of Health” on page 12 to learn more.

Brand Your Wellness Program

In the same way that your business name and brand provide visibility for your business, your wellness program should also have its own brand to draw attention to it. Having a wellness image or brand that is easily recognizable to employees is an important piece in the establishment of your program.

Consistently using your program’s name on all wellness-related communications conveys to employees that this program is here to stay. Employees are more likely to participate if they perceive that the program is an important and ongoing part of your organization.

When selecting an official “name” for your wellness program, engage employees in naming the program. Have a wellness program naming contest or a logo contest. Use the committee members as judges and announce the name in a grandiose way. This will get employees excited that they were involved in the branding of the program. When you make a big deal, it becomes a big deal.
Create a Mission Statement

Develop a wellness mission statement so that all stakeholders understand your principal values and goals. This statement should provide guidance for your wellness committee and should support your company’s mission statement. When defining a wellness mission statement, consider the following:

- Does it describe the fundamental purpose of your company’s wellness program?
- Does it answer the question, “Why does the wellness program and committee exist?”
- Does it explain the purpose of the wellness program for both the employees of the company and for the public?

Mission statement examples:
- Recognizing that employees perform their best in both their personal and work life when they are healthy, the mission of our wellness program is to maintain and support a workplace that encourages a healthy lifestyle.
- The mission of our wellness committee is to promote and support optimal well-being of our employee population by providing and facilitating education and activities designed to improve health and well-being, and reduce medical expenditures.
- The mission of our wellness committee is to foster a worksite culture as supportive work environment that positively impacts our employees’ decisions and actions around healthy lifestyle choices.

When established, the mission statement should be made known to the entire organization. This transparent communication is key to getting all stakeholders engaged and on board with the organizations’ interest in health and wellness.

Develop Goals and Objectives

Goals and objectives keep your program focused on your overall mission and will help you evaluate your program’s success. Goals can be broken down into three categories: implementation, participation, and outcome. See examples below:

Examples of implementation goals:
- Host an annual health screening event every October.
- Implement a walking challenge from May to June.
- Develop and send out a quarterly wellness newsletter.

Examples of participation goals:
- Increase the number of annual health screening participants from 60 to 85 percent.
- Obtain 80 percent participation in the walking challenge.
- Increase the number of employees using the on-site fitness facility by 20 percent.
Examples of outcome goals:

- Decrease the number of employees with a blood pressure of >140/90 by 15 percent by December 31.
- Decrease the number of tobacco users from six to four percent by December 31.
- Increase the number of employees that have a designated primary care physician from 70 to 95 percent by December 31.

It’s important to have objectives that are specific to each of these goals. Your objectives will define how you will accomplish each goal. Objectives can also be described as strategies and should be clear, time-limited, and stated in a way that makes it measurable.

Here is an example of a goal and objectives for the general wellness initiatives:

**Goal:** To educate employees on the importance of physical activity and provide opportunities for employees to engage in physical activity that promotes health and well-being.

**Objectives:**

- Provide quarterly lunch-n-learns on physical activity.
- Develop and implement a wellness challenge that focuses on physical activity.
- Provide employees with information on safe walking routes and distances from their worksite, and encourage using breaks and lunchtime as an opportunity to take a walk.

It’s a good idea to give your program a year to mature before you measure any of your objectives or determine the results of your program. Be clear about this expectation with your management team and with your wellness committee. Results will take time.

In addition to your main goal, each individual program will have its own set of goals and objectives.

The following is an example of a goal for a walking challenge:
**Goal:** Increase physical activity among employees who are already physically active, and increase the number of employees who are not currently physically active, through a ten-week wellness challenge focused on walking.

**Objectives:**

- Provide surveys to all employees to assess their current level of physical activity (zero to seven days per week)
- Engage at least 50 percent of the employees in participation.
- Achieve a participant completion rate of 95 percent.
- Have at least 50 percent of participants increase their number of steps walked each day.
- Have at least ten percent of those who get zero to two days of physical activity increase to three or more days of physical activity.

*If you’re just beginning your wellness program, we recommend you reward individuals based on participation, rather than performance. This can motivate more people to participate and engage in a new health behavior.*
Establish a Budget

An established budget will allow the wellness committee to plan activities and evaluate the program's performance in terms of cost benefit, as well as health benefit. The committee should know how much they can spend over the course of a year for all programs, and if special programs can be financed outside of the budgeted amount.

Consider the following as you establish your wellness budget:

- Will you need to allocate funds to provide a partial or full salary to a dedicated wellness position?

- Create a list of wellness activities and estimate potential costs (such as health fair, health education presentations, etc.).

- What costs are associated with an onsite health screening? Check with your health plan provider to see if they will cover some or all of this service.

- What kind of incentives are needed to motivate people to participate and where can I find low- to no-cost giveaways?

- Can some programs have a cost-sharing element for employees to feel more invested in participating and to help fund the rewards?

- What resources are available to us through our other partners that I can leverage to develop a comprehensive wellness program with a small budget (i.e. EAP provider, dental plan benefits, health plan benefits, community resources, etc.)?

Employee cost sharing is an option for some specific activities. For example:

- Consider collecting a small fee from employees who participate in health-related competitions, and use the money collected for team prizes.

- Offer workplace Weight Watchers meetings at a discount to your employees. The Weight Watchers leader would be responsible for collecting the weekly fee, and you would provide the space and work time.

Remember to budget for program expenses, such as required materials (handouts, pedometers, stretch bands); promotional materials (posters, fliers); and incentives (gifts). Your budget should also reflect whether or not you choose to charge employees to participate. See a sample of a budget worksheet in Appendix III.

To give you an idea of where to start, studies show that you can run a comprehensive and effective employee wellness program by budgeting anywhere from $75-$150 per employee per year. If this average is beyond your budget today, keep in mind that many wellness programs begin on a shoestring budget. However, with the right plan in place, your organization can still successfully and positively impact productivity and employee moral on much less.
What’s Next

Create a Culture of Health

A true wellness culture is simply defined as “an environment in which the healthful choice is the easy choice.” Environmental factors play a major role in how we, as individuals, make decisions. The environment in which we live, work, and play can determine whether or not we choose:

- Stairs instead of the elevator
- Fresh fruit instead of a vending machine item
- Quality family time over TV time

Creating a healthy organization is no small task and may take years to accomplish. It’s also important to remember that improving culture is the shared responsibility between your organization and your employees. A great first step to understanding your organization’s current state of culture is to complete a health culture audit. A health culture audit is an assessment that will help you to analyze the unwritten rule of your organization. For instance, does your organization encourage tobacco cessation by hosting tobacco cessation classes, but fails to have a worksite policy that prohibits smoking onsite or in work vehicles? Is healthy eating a priority within your wellness program’s goals and objectives, yet there continues to be unhealthy food choices in vending machines, at meetings, and other employee events? These types of scenarios send mixed messages, ultimately leading to confusion and decreasing the impact of your wellness program.

With a health culture audit, you can find out the following:

- Which health practices and/or programs are likely to positively impact the current workplace environment?
- Which aspects of your organization fail to support (or interfere) with your wellness programming?
- Which aspects of your culture do not align with your written policies?
- What are the areas for improvement when it comes to creating a culture of health and wellness?

To conduct a health culture audit, you can choose from a variety of free resources, such as:

- Wellness@Work Worksite Assessment Tool: http://www.wellnessatworkoregon.org/waws/
- HERO Scorecard: http://www.the-hero.org/scorecard_folder/scorecard.htm

Furthermore, one of the most effective messages to support a culture of health is having leaders of the organization role-model these behaviors. Those leaders who walk-the-talk have more influence on the cascading effect of a culture of health.

The following is a list of ideas that support a culture of health:

**Nutrition**

- Encourage healthy foods at meetings and work functions.
- Provide refrigerators for safe food storage and microwaves.
- Have healthy snack options in vending machines and display their nutritional content.
- Subsidize a healthy food option in an on-site cafeteria.
- Obtain and distribute coupons for local restaurants that offer healthy food options.
- Provide fresh fruit to employees weekly or monthly.

**Physical Activity**

- Encourage movement during lunch and breaks.
- Post signs near elevators to encourage the use of the stairs.
- Encourage “walk-n-talk” meetings when there are three or fewer people in the meeting.
- Promote nearby walking paths.
- Offer discounts to local fitness facilities or stores.
**Stress Management**

- Encourage employees to step away from their work for a breath of fresh air.
- Encourage employees to *not* take on more than they can handle.
- Allow individuals to have a voice during staff meetings.
- Post signs that remind people to laugh, take three deep breaths, apologize for a mistake and move on, etc.
- Promote activities that employees can engage in outside of work—company picnics, sport leagues, fun runs, etc.
- Offer ergonomic workstation assessment.
- Provide resources for emotional health.

**Tobacco Cessation**

- Establish a tobacco policy.
- Implement a tobacco free campus.

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**Establish the Elements of Your Wellness Program**

Your wellness program design should include several elements that reach your employees and their dependents. No one avenue will address all the health and wellness needs of the entire group. Including several approaches in your program plan will help you achieve your goals for a healthier workforce. When planning your program, look to the following as a guide:

- **Know your baseline:** Assess your employees’ interests and health risks. This will help you determine which programs to offer and give you a baseline for measuring the success of those programs.
- **Promote health education:** Focus on skill development and lifestyle behavior change. Build awareness and tailor education to employee interests and needs.

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**Sample Worksite Wellness Policies:**

*Culture:* WellnessAtWorkOregon.org/?page_id=27
*Physical Activity:* http://www.wellnessatworkoregon.org/?page_id=67

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**Provide a supportive environment:** Implement policies that promote health and reduce disease risk, integrating wellness into your organization’s structure. Garner support from all levels of management. Managers who participate in your programs encourage others by their example.

**Link to related programs:**

- Employee assistance programs (EAPs) that help the individual balance work and home life
- Disease management programs that provide those who have certain chronic conditions with support, education, and monitoring
- Web-based programs that can provide additional opportunities for health self-management

**Develop a mechanism to assess how the program is working,** and how it might be improved, such as a survey.
Wellness Activity Suggestions

Set up a health and wellness library. Free and low-cost health information and pamphlets are available from nonprofit health organizations, such as the American Cancer Society, American Diabetes Association, American Heart Association, and the American Lung Association.

Promote wellness through your employee communications. Use your typical methods of communication to send health messages. Use your staff meetings to announce upcoming events, or promote programs in your company-wide newsletter or intranet. In addition, promoting a simple health message monthly can be achieved very easily with PacificSource monthly Wellness Toolkits. Topics range from financial health and weight management to stress reduction and sun safety. Ask your wellness consultant for more information on Wellness Toolkits.

Encourage use of Health Manager, PacificSource’s online health and wellness center. This web resource is free to all PacificSource members and contains up-to-date health information. Members can access Health Manager from the InTouch area of PacificSource.com.

Encourage use of the wellness and disease management programs available through your health plan. PacificSource offers programs geared to decreasing health risk and maintaining wellness. Contact your PacificSource Client Service Representative for more information about programs available to you.

Arrange for on-site Lunch and Learn presentations on health-related topics. Often, community health professionals are willing to do presentations for free or at a low cost.

Create an environment where wellness can be fun. Organize team or department competitions to achieve measurable wellness goals, such as steps taken, vegetables eaten, or minutes of physical activity.

Promote membership at your local fitness center or gym. Many facilities offer a corporate discount or use the Global Fit Gym Membership discount available to members of PacificSource.

Promote Weight Watchers, or a similar program, so that employees can attend weight management meetings in their local area. PacificSource members are eligible for up to a $100 reimbursement for Weight Watchers one time per plan year.

Write and Follow a Planning Checklist

As you select, develop, and implement wellness activities, consider using an operating plan or planning checklist to keep components of your wellness plan in order, including who is responsible for carrying out each specific component of the plan. This will create an opportunity to organize your plan, and it provides a tool to communicate your plan to key stakeholders. This also keeps wellness committee members accountable for the tasks they are responsible for and will help them see their roles as they relate to the big picture. See a sample of a planning checklist in Appendix III.

Select Wellness Activities

When considering which activities you will select as part of your wellness program, you will want to consider the following questions:

- What are your population’s health and wellness interests?
- What activities will support a healthful culture?
- What are your population’s health risks?
- How much of the wellness program budget is assigned to wellness activities?
- Will the activities reach most people based on their physical location and access to computers?
- What internal resources do you have to help facilitate these activities?
- Where can you leverage other partnerships and relationships to help facilitate programs and services?
Look for other discounts. For example, a coffeehouse near your facility might be willing to discount low fat specialty coffees to employees who walk there. Look for ways to partner with local establishments to highlight their healthy options and possibly offer coupons to your employees to help promote their business.

Map out distances within your facility and nearby locations. For example, your workers might be able to walk the full length of your facility and add an additional 2,000 steps per day, or walk a half mile just by walking around your building. Provide route maps or signs that designate the distance traveled.

Have an annual employee health fair to call attention to local health resources. Many local businesses are willing to come to your location to promote their service or product. Choose vendors carefully and ensure their message is consistent with your mission to improve health.

Host an onsite health screening. An onsite health screening is a great way to create awareness around health risk factors that are modifiable through lifestyle change. These services can often be covered by your health plan. Check with your PacificSource Wellness Consultant to find out if this benefit is available to your organization.

Start meetings or the work day with group stretches to improve flexibility and reduce tension and promote camaraderie.

Promote using alternative transportation, such as bicycling, to travel to and from work.

You’ll find health-related newsletter articles, posters, and payroll stuffers at PacificSource.com > For Employers > PacificSource Extras > Wellness Communication Toolkit.
Engaging Employees

Survey Employee Interests
Gaining the support of your employees is just as necessary for the success of your program as management support. Ask employees what they are interested in and what their needs are. Remember, a wellness program addresses behavioral change. People are more willing to change if they are involved in the process. A needs and interests survey can build anticipation and excitement, and increase participation in your programs. See a sample in Appendix II.

Motivate Your Employees to Succeed
Keeping employees engaged in any wellness program that you institute is paramount to its success. As part of your program planning, you should include how you plan to maintain momentum. There are various tools that you can use to reinforce the healthful behaviors that you’re trying to address.

Here are some ways to encourage participation:

- Schedule educational talks at the beginning of and half-way through the program.
- Send health tips via your company intranet or email.
- Encourage participation at work. For example, give “bonus breaks” for walking (e.g., give walkers an additional 15 minutes a day just for walking).
- Provide tools for success. For instance, offer healthy cooking classes in your lunchroom, add some workout equipment to an empty meeting room, or measure the mileage around your building or parking lot and mark distances so participants can see how far they’re walking.
- Have friendly competitions between departmental teams.
- Make wellness a part of the company culture and continue programs throughout the year.
- Encourage lunchtime walking or fitness groups.

Research has shown that programs using incentives have higher overall participation rates. The following incentives have shown to produce the following participation rates:

- **No incentive**: 2%–10%
- **Passive incentive**: 15%–25%
- **Small item incentive**: 20%–35%
- **Cash incentive**: 20%–40%
- **Benefit plan improvement**: 30%–60%
- **Benefit plan plus cost reduction**: 50%–70%
- **Combination of benefits and cash**: 75%–100%

Use Incentives to Encourage Participation

Health promotion and wellness programs are successful by increasing awareness and providing education and support (and sometimes intervention) to the individual. Well-designed incentives not only create interest in a particular health issue, but may also inspire action. They also reinforce the company's commitment to helping employees become, and remain, healthy.

Even though people know that a healthy lifestyle is best, incentives give them that extra nudge to begin making changes in how they live. It takes time to feel the positive benefits of exercise or a healthy diet. Having a reward for reaching a goal or target can motivate people to stay on track until they start seeing positive changes in things such as stamina, weight, or their sense of well-being.

Incentives can range from low-cost items, such as water bottles, to more expensive items, such as fitness equipment, gift certificates, added vacation hours, and weekend getaways.

Some companies use more extensive incentives, such as decreased health insurance copayments or increased benefit levels. Since there are laws and requirements for programs that offer rewards or penalties based on health standards, additional administrative work is necessary to ensure that these requirements are met. We highly recommend that when offering any incentive, big or small, you first have your legal consultant review it. See the section "Understanding Laws: Wellness Programs and Incentives" to learn more.

Incentives Don’t Have to Be Expensive

Here are some ideas to consider as you begin your wellness program:

- T-shirts, pedometers, water bottles
- discounts to local stores that provide healthful products
- discounts or paid memberships to fitness clubs
- paid time off to walk or do a fitness activity
- vacation days
- subscriptions to fitness magazines or wellness apps for smart phones
- athletic bags or athletic gear
- cookbooks
- paid or subsidized session with a personal trainer or dietician
- charitable donation on behalf of the employee

Other Important Aspects to Consider When Choosing Appropriate Incentives

- If you’re just beginning your wellness program, we recommend that you reward individuals based on participation rather than performance. This can motivate more people to participate and engage in a new health behavior.
- Incentives don’t have to be tangible items. Gauge your workforce to see how well they respond to intangible rewards such as recognition or a certificate of completion. Some people respond well to a sense of accomplishment or the fact that they learned a new skill. Figure out a way to instill those intrinsic motivators to certain wellness initiatives.
- Every participant should have the chance to earn the reward, not just those who achieve the best result (i.e., the winner). This will encourage those who don’t regularly practice the given behavior but will try because they feel like then can earn a reward.
Develop an Evaluation Plan
A good program evaluation looks at information to learn how well the program is working and whether or not it’s achieving the expected results. Furthermore, the information gained through evaluating your program and identifying needed changes will help you develop a road map for a more long-term approach to your wellness programming.

Program costs and outcomes can also be compared. You can use the evaluation process to assess both your full wellness program and each individual program or activity to see if you have met your objectives. You will want to begin by gathering information on the individual programs or pieces of your overall program, such as:

- participation rates
- participant satisfaction with wellness initiatives
- outcome measures, from biometric measurements and fitness testing results
- changes in number of risk factors
- improvements in knowledge, attitudes, and behaviors
- wellness culture evaluation results
- medical and prescription claims cost
- productivity/presenteeism
- absenteeism
- workers’ compensation

When it comes to participation, you should also ask those who are not participating in your programs why they are not participating. This information is valuable as you move forward. A simple program evaluation can determine what the participant liked, did not like, and what suggestions they might have. See sample in Appendix II. Consider using an online survey tool, such as SurveyMonkey (www.surveymonkey.com).

Outcome measures help you to know if the specific program goals were achieved. For example, if you offer a smoking cessation program, how many participants are smoke-free after six months or one year? Outcome data that show program goals are not being met point to the need for changes. If outcomes are not as expected, it may be because:

- The program was not implemented as planned. Perhaps there was limited interest or participation.
- The program was not well designed to achieve the desired results. Did it, however, achieve an unintended result? For example, a fitness activity involving teams might not have met your established fitness objectives, but employee morale was improved since the program was seen as a fun activity.
- The program goals were unrealistic or overly ambitious given the resources available.
- Health improvement programs are dynamic. Your program should evolve with the needs and interests of your employees. Feel free to modify your program as needed.

Sharing Your Results
Sharing your results with all of your key stakeholders, including your management team and wellness program participants, can help to gain momentum for the future of your program. It will encourage the late-comers to get involved, or those who have the tendency to want to wait and see how things go before joining the program.

You may be expected to present the results of your wellness efforts to senior leadership on a quarterly or annual basis. Be prepared to demonstrate the goals and objectives the committee has selected and how well you are doing in those areas. This information will be critical for the continued support from leadership and may be the catalyst for the allocation of more resources towards your wellness program.

In addition, it’s wise to continually update your leadership team on the outcomes of your wellness efforts. The development of a data dashboard is a simple way to provide ongoing reporting. A data dashboard can be a graphical representation of participation rates, satisfaction rates, health risk stratification, and any other key element you may be measuring. To learn more about developing a data dashboard, see the following resources.
Tap into Wellness Resources

**Wellness At Work:**
WellnessAtWorkOregon.org

**Aim for a Healthy Weight, National Institute of Health, National Heart, Lung, and Blood Institute:** Information on weight control, nutrition, physical activity—includes BMI calculator, menu planner, recipes
NHLBI.nih.gov/health/public/heart/obesity/lose_wt/index.htm

**American Diabetes Association:** Information and publications on diabetes, nutrition, and exercise
Diabetes.org

**American Dietetic Association:** Information and publications on weight control, nutrition, and physical activity
Eatright.org

**American Heart Association:** Information on heart disease; healthy lifestyles, including diet and nutrition; and exercise and fitness
Americanheart.org

**Centers for Disease Control and Prevention:** Provides health and safety information
CDC.gov

**Centers for Disease Control Workplace Health Promotion:**
CDC.gov/WorkplaceHealthPromotion

**Healthy Workforce 2010: An Essential Health Promotion Sourcebook for Employers, Large and Small, Partnership for Prevention, Washington, D.C.**
ACSWorkplacesolutions.com/documents/Healthy_Workforce_2010.pdf

**ChooseMyPlate, United States Department of Agriculture:** Information on nutrition and dietary guidelines for kids and families
ChooseMyPlate.gov

**Oregon Asthma Resource Bank:** Asthma educational materials
Oregon.gov/DHS/ph/asthma/resourcebank/index.shtml

**President’s Council on Physical Fitness and Sports:** Information and publications on physical activity
Fitness.gov

**Weight-Control Information Network (WIN), National Institute of Diabetes and Digestive and Kidney Diseases:** Information and publications on weight control, nutrition, and physical activity
WIN.niddk.nih.gov

**Wellness Councils of America (WELCOA):** Workplace wellness resources, tools, and awarding entity
WELCOA.org

**National Wellness Institute:** Tools and resources for those that promote health and wellness in underserved communities
NationalWellness.org

Need more ideas?
**Contact us.**

wellness@pacificsource.com
(541) 225-2811
Worksite wellness programs have evolved over the years from a programmatic approach to one that rewards individuals on objective health measures as opposed to participation only. The incentives are typically tiered health plan premiums based on health status. This approach is becoming more and more popular in the workplace because employers are looking for strategies to help them reduce their healthcare expenditures. The philosophy behind this type of incentive is that individuals will be financially motivated to make health behavior changes. These changes can lead to decrease utilization of the health plan, elimination of medications for health issues that can be controlled through lifestyle choice, and prevention of chronic disease.

On June 3, 2013, the Department of Treasury, Department of Labor, and the Department of Health and Human Services released final rulings and regulation on Incentives for Nondiscriminatory Wellness Programs. The final regulations provide guidance for legally implementing this type of incentive strategy and are meant to protect the employee from discrimination for a health factor.

As employers are looking for guidance and best practice approaches to this strategy, the following information provides a basic understanding. We strongly encourage you to seek legal guidance as you consider this type of incentive design.

**Participatory vs. Health Contingent Wellness Programs**

It’s important to understand the two categories for wellness programs: Participatory Wellness Programs and Health Contingent Wellness Programs.

**Participatory Wellness Programs** are made available to all similarly situated individuals and that either:

- don’t provide a reward, or
- don’t include any conditions for obtaining a reward that are based on an individual satisfying a standard that is related to a health factor.

Participatory programs are not required to meet the five requirements applicable to Health Contingent Wellness Programs, but must be made available to all similarly situated individuals.

Examples of participatory wellness programs are:

1. a program that reimburses for all or part of the cost of membership in a fitness center,
2. a program that provides a reward to employees for attending a monthly, no-cost health education seminar, and
3. a program that pays for all or part of a tobacco cessation class.

**Health Contingent Wellness Programs** require an individual to satisfy a standard related to a health factor to obtain the reward. The most commonly used health risk factors are Body Mass Index (BMI), tobacco use, cholesterol, blood pressure, and glucose. These health risk factors are indicators of chronic conditions such as diabetes, heart disease, and cancer, and are ones that can be positively impacted through lifestyle changes.
Examples of health contingent wellness programs are:

1. A program that imposes a premium surcharge based on tobacco use, and

2. A program that uses a biometric screening or a health assessment to identify employees with specific risk factors and provides a reward to employees identified as within a normal or healthy range (or at low risk for certain medical conditions).

The final rulings further classify Health Contingent Wellness Programs into two sub-categories: activity only wellness programs, and outcomes-based wellness programs.

An activity only wellness program sets parameters around when an individual is required to perform or complete an activity related to a health factor in order to obtain a reward.

An outcome-based wellness program sets parameters around when an individual must attain or maintain a specific health outcome (tobacco free, or attaining certain results on biometric screenings) in order to obtain a reward.

Requirements for Health Contingent Wellness Programs

In order for employers to initiate a Health Contingent Wellness Programs, they must comply with the five requirements of the Health Insurance Portability and Accountability Act (HIPAA) nondiscrimination guidelines:

1. Frequency of opportunity to qualify: The program must give individuals eligible to participate the opportunity to qualify for the reward at least once per year.

2. Size of the reward: The total reward for all the plan’s wellness programs that require satisfaction of a standard related to a health factor is limited—generally, it must not exceed 30 percent of the cost of employee-only coverage under the plan. If dependents (such as spouses and/or dependent children) may participate in the wellness program, the reward must not exceed 30 percent of the cost of the coverage in which an employee and any dependents are enrolled.

Furthermore, an additional 20 percent can be applied when the wellness program is designed to prevent or reduce the use of tobacco (up to 50 percent total when tobacco is included).

3. Reasonably designed to promote good health or prevent disease: The program must be reasonably designed to promote health and prevent disease. If a wellness program has a reasonable chance of improving the health of participants and is not overly burdensome, is not a subterfuge for discriminating based upon a health factor, and is not highly suspect in the method chosen to promote health and prevent disease, the wellness program will satisfy this requirement.

4. Available to all similarly situated individuals and reasonable alternative standard: The wellness program must be available to all similarly situated individuals. For example, a reward could be offered only to employees and not retirees, or only to employees and spouses and not dependent children.

The wellness program must also provide a reasonable alternative standard for obtaining the reward for certain individuals. This alternative standard must be available for individuals for whom it’s unreasonably difficult due to a medical condition to satisfy the otherwise applicable standard, or for whom it’s medically inadvisable to attempt to satisfy the otherwise applicable standard.

Please note that the program doesn’t need to establish the specific reasonable alternative standard before the program commences. It’s sufficient to determine a reasonable alternative standard once a participant informs the plan that it’s unreasonably difficult for the participant due to a medical condition to satisfy the general standard. A waiver can also be used to fulfill the requirement.

5. Disclose alternative: The plan must disclose in all materials describing the terms of the program the availability of a reasonable alternative standard (or the possibility of a waiver of the initial standard).

For a more in-depth look at this topic, please request a copy of our white paper, “Understanding Health Contingent Wellness Incentives,” or refer to the sources provided at the end of this section.

ADA Compliance

Even if wellness programs fully comply with HIPAA, you must also ensure that you meet the requirements of the Americans with Disability Act (ADA). The ADA prohibits discrimination against individuals with disabilities in terms of employment, including health and wellness programs. All participation in your wellness programs should be voluntary and all medical information must be kept confidential. For more information, visit USDOJ.gov/crt/ada/pubs/ada.htm.
Employers should also consider any state insurance laws that may limit their ability to implement a wellness program.

**Understanding GINA**
The Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits discrimination based on genetic information. The law restricts the timing, the manner in which the data is used, and prohibits any rewards for completion of a health assessment. Our online Health Quotient® health assessment is GINA compliant. For complete details, visit www.HHS.gov/ocr/privacy/hipaa/understanding/special/genetic/ginaifr.pdf.

**Taxation of Wellness Incentives**
Many employers often overlook the tax implications of wellness incentives because they consider the value as nominal. Wellness incentives are taxed like all other rewards and there is no exemption under current tax law that excludes from income the incentives paid through wellness programs. In general, wellness incentives are subject to the same tax rules as all other benefits—the value of a reward is treated as taxable wages and subject to payroll taxes.

As previously mentioned, with Health Contingent Wellness Programs, the reward is usually tied financially to the health plan, with the majority of the incentives being premium differentials. Because an employer-sponsored health plan is considered a tax-free benefit, the incentive provided through the premium differential is not subject to income tax.

**PLEASE NOTE:** This information does not serve as legal or tax advice. Please consult your team of experts in the matter of legalities and tax implications of wellness programs and incentives.
Appendix I: Sample Forms

Use of a Medical Consent Form

Any health or wellness program centered on physical activity could have an inherent risk of injury or accident. Walking, which is a light to moderate activity, can have potential hazards. A participant with certain medical conditions or risk factors may be at risk of injury. Conditions and risk factors may include:

- smoking
- high blood pressure or high cholesterol
- diabetes
- obesity
- sedentary lifestyle
- personal or family history of heart disease or stroke
- age
- certain mobility problems

Ideally, high-risk participants should get their physician’s consent before participating in any fitness program.

Medical Consent Form

___________________________________________________________ has medical approval to participate in

Participant name

___________________________________________________________

Name of program

The following restrictions apply. (If none, please leave blank.)

___________________________________________________________

___________________________________________________________

___________________________________________________________

Physician signature ____________________________ Physician name, printed ____________________________

Street address ____________________________ Phone ____________________________

City/State/Zip ____________________________ Date ____________________________

NOTE: These forms are provided for illustrative purposes only, and do not constitute legal or tax advice. Please consult an appropriate professional before implementing a wellness program.
Committee Member Commitment Form

Use this form to not only educate the committee member (and their supervisor) what is expected of them, but to also demonstrate the importance of serving on this committee.

Wellness Committee Member Responsibilities and Commitment Form

What does it mean to serve on the Wellness Committee?
Wellness committee members serve as a resource for their working location/department about the wellness programs and initiatives. Serving on the committee should not interfere with regular job duties and supervisor permission is required. A committee member may be asked to help in promoting upcoming events, obtain basic knowledge to answer coworkers questions about the program, participate or volunteer in wellness events, and encourage other to join. A committee member may also be involved in the planning process when appropriate.

As a wellness committee member you will be asked to:
• Identify yourself as a wellness committee member to colleagues, peers, etc.
• Encourage healthy habits in the office by coordinating healthy lunches, walking meetings, or initiating any other creative way to get moving, as well as eating healthy and relieving stress in the workplace.
• Distribute fliers for wellness events and programs.
• Share provided information on upcoming health and wellness events and programs during weekly or monthly department meetings.
• Invite coworkers by email or word of mouth to participate in wellness events and programs.
• Be available to answer questions from coworkers regarding wellness.
• Encourage and educate new employees about the program.
• Create or implement a program specifically for your location or department (e.g., form a walking club).

How long does a committee member serve?
Committee members are selected annually and can serve up to a three year term.

As a wellness committee member, I understand that I will serve as a liaison between my colleagues and the wellness efforts supported within my organization. I will do my best to uphold the mission and vision of the Wellness Committee and will promote and support the wellness events and programs in my work area.

I also understand that confidentiality is an important aspect in maintaining trust amongst our employees. Because the Wellness Committee may offer programs about potentially sensitive issues, the transactions and interaction regarding personal and medical information that take place in the wellness programs will be confidential and will be respected as such. All committee members will adhere to the HIPAA guidelines that protect Personal Health Information (PHI). PHI is protected under such law.

By signing below, I agree as a committee member to respect individuals PHI and the law that protects it.

Print name: ___________________________ Sign name: ___________________________ DATE: ___________________________

Supervisor approval (print name): ___________________________ Supervisor approval (sign name): ___________________________
Appendix II: Sample Surveys

Please feel free to use and modify the materials in this section to fit the needs of your wellness program.

Wellness Interest Survey

Name (optional): _____________________________________________

Location: ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Shift: ☐ Day ☐ Evening ☐ Nights ☐ Weekends ☐ Other

General

1. Which of the following categories would you place yourself in?
   ☐ I am not interested in pursuing a healthy lifestyle.
   ☐ I have been thinking about changing some of my health behaviors.
   ☐ I am planning on making a health behavior change within the next 30 days.
   ☐ I have made some health behavior changes, but I still have trouble following through with them.
   ☐ I have had a healthy lifestyle for years.

2. Do you have a Primary Care Physician (General/Family Practice, OBGYN, NP, etc.)?
   ☐ Yes ☐ No, why not? ____________________________________________

3. Would you be interested in taking a Health Assessment Survey?
   ☐ Yes—I’m interested in learning more about my health
   ☐ Yes—if I was given an incentive for taking the assessment
   ☐ No, explain (optional) ____________________________________________

4. Would you take part in an on-site wellness screening (blood pressure, cholesterol, Glucose, BMI)?
   ☐ Yes ☐ No, why not? ____________________________________________

5. Are you aware that your health plan offers preventive health programs for tobacco cessation, weight management, nutrition, exercise, and general health?
   ☐ Yes ☐ No ☐ I would like to know more.

6. Are you aware of the Employee Assistance Program (EAP) provided by your employer?
   ☐ Yes ☐ No ☐ I would like to know more.

7. What types of incentives would motivate you to participate in wellness programs?
   ☐ Raffles for prizes ☐ Reduction of premium contribution
   ☐ T-shirts, water bottles ☐ Credit to health savings account
   ☐ Donation to charity ☐ Gym membership or dollars for wellness and fitness
   ☐ Gift cards ☐ A paid day off
8. How do you prefer to receive updates and information about health and wellness events and activities offered?

- Email
- Fliers and posters
- Communications at staff meetings
- Information mailed to my home
- Other (please list) ________________

**Lunch and Learn Wellness Presentations**

1. Are you interested in Lunch and Learn wellness presentations?

- Yes
- No

2. Which day of the week do you prefer to attend a wellness presentation?

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday

3. What time works best for your schedule?

- 11:30-Noon
- Noon-12:30 p.m.
- 12:30-1:00
- 1:00-1:30
- 1:30-2:00
- 5:00

4. Please rank your top five topic areas of interest:

- Fitness
- Relationships
- Stress management
- Healthy eating
- Weight management
- Coping with chronic disease
- Depression
- Smoking cessation
- Prevention of chronic disease
- Financial health
- Caring for a family member
- Other – please list: ________________

**Fitness**

1. If your employer provided a gym membership reimbursement or discount, would you utilize this benefit?

- Yes
- Maybe
- No

2. Would you be interested in on-site group exercise classes?

- Yes
- Maybe
- No

3. What type of exercise classes would interest you?

- Yoga
- Circuit training
- Cardio sculpt
- Boot camp
- Zumba
- Hip-hop
- Stretch
- Weight training
- Abs
- Kickboxing
- Other: ________________

4. If classes were offered, what time would work best for your schedule?

- 5:00 a.m.
- 6:00 a.m.
- Noon
- 5:00 p.m.
- 6:00 p.m.

5. If you don’t want to participate in group exercise, what is the reason?

- No time
- Offered at the wrong times
- Too expensive
- Don’t like the classes offered
- No interest
- Don’t like to workout with coworkers
- Other: ________________

6. Please list any suggestions for a worksite fitness program: ________________
Wellness Challenges/Campaigns

1. Would you participate in a health challenge or campaign?
   ![Yes](ought) ![No](ought)

2. What types of challenges or campaigns are you interested in?
   ![Weight loss](ought) ![Walking](ought) ![Fitness](ought) ![Stress management](ought) ![Healthy eating](ought) ![Know your numbers](ought)

Stress Management

1. Would you be interested in massage services at your worksite?
   ![Frequently](ought) ![Occasionally](ought) ![Rarely](ought) ![Never](ought)

2. Would you be willing to pay $1 per minute for a massage?
   ![Yes](ought) ![No](ought)

3. How often would you sign up for a massage?
   ![Every week](ought) ![Every other week](ought) ![Once a month](ought)

4. If you answered rarely or never, what is preventing you from getting a massage?
   ![Time](ought) ![Never works with my schedule](ought) ![Too much money](ought) ![Not interested](ought)

5. Would you be interested in a workstation ergonomic assessment?
   ![Yes](ought) ![No](ought)

Healthy Eating

1. Would you be interested in the following?
   ![Healthy lunch subsidy](ought) ![Healthy vending machine options](ought)
   ![On-site Weight Watchers sessions](ought) ![Healthy snacks at meetings](ought)
   ![Healthy cooking demonstrations](ought) ![Refrigerators on-site](ought)

2. What other suggestions do you have for healthy eating at your worksite?______________________________
Please indicate your agreement with the following statements:

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I buy heart-healthy snacks when they are available (i.e., pretzels,</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>cereals, yogurt, 1% or skim milk, fresh fruit, 100% juice, raisins or</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>other dried fruit).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I would eat fruit and healthy snacks if available at our staff meetings.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I choose food based on taste and quantity, not on nutritional</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>content.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I eat breakfast every day.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I make an effort to eat enough fiber from whole grains, cereals,</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>fruits, and vegetables.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am satisfied with my current state of health.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I make time for 30 minutes of physical activity most days of the week.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I practice some type of stress management on a regular basis.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I currently use tobacco products.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I am currently at my ideal weight.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Healthier people are more productive at work.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Paying attention to healthy eating and exercising takes too much</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>effort.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I know what it takes to lead a healthy lifestyle.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I have had my blood pressure checked within the last year.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I wear a seat belt all the time when I am in a motor vehicle.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>I usually consult a medical self-care book when I am sick.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>During breaks at work or at home, I prefer to do something physically</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>active like stretching, going for a walk, riding my bike, or playing with</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>kids outside.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>My employer values my health and well-being.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>My employer provides opportunities for me to engage in my health.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>
Program Evaluation Survey

Program: Step It Up—10,000 Step Challenge
Thank you for taking the time to complete this evaluation. Your response will help us to evaluate the program and to identify ways to improve it.

Name: __________________________ Date: ______________________

<table>
<thead>
<tr>
<th>Please indicate how well you agree with the following statements</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I enjoyed participating in this program.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am more aware of the level of movement I have throughout my day as a result of this program.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am more physically active now than I was before the start of this program.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I made other health behavior changes during this program.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I would participate in this program again.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I would encourage others to participate in this program.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What did you like most about the program?

________________________________________________________________________

What did you like least about the program?

________________________________________________________________________

Do you have any suggestions on program improvement?

________________________________________________________________________
The following samples will help you plan and implement wellness programs. Please feel free to use or modify to meet your needs.

**Budget Worksheet**

This is a sample of what you might consider for each wellness activity. You may not need to consider each category, but you will need to be prepared to work within a budgeted amount for any program you present.

<table>
<thead>
<tr>
<th>Programs</th>
<th>Qty.</th>
<th>Cost</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking Challenge</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pedometers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printing costs for program guide and tracking logs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printing costs for fliers and other promotional materials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fees for web-based tracking program</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kick-off event</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Incentives</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Wellness Presentation**

<table>
<thead>
<tr>
<th>Qty.</th>
<th>Cost</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Presenter’s speaking fees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lunch provided</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printing costs for fliers and other promotional materials</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Campaigns**

<table>
<thead>
<tr>
<th>Qty.</th>
<th>Cost</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vending Machine Makeover</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kick-off event</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printing costs for fliers and other promotional materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prizes and giveaways</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Qty.</th>
<th>Cost</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onsite Health Screening</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printing costs for program guide</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printing costs for fliers and other promotional materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Breakfast for participants</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Wellness Event and Program Planning Checklist

This form can be used for each individual activity and program, depending on the complexity.

<table>
<thead>
<tr>
<th>Task</th>
<th>Person Responsible</th>
<th>Deadline</th>
<th>Status/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Present proposal to management for approval and support</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Review program materials and submit to PacificSource for customization needs</td>
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<td></td>
<td></td>
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<tr>
<td>Convene wellness committee to distribute tasks and discuss details</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Develop program goals and objectives with metrics for evaluating program effectiveness</td>
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<tr>
<td>Decide on and order incentives</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Plan other program activities (e.g., educational sessions)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop registration and sign-up process</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop promotional campaign with materials needed (fliers, email language, staff meeting presentations, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Promotion begins</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program begins</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Ongoing communication to educate and continue to engage participants.</td>
<td></td>
<td></td>
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<tr>
<td>Distribute program evaluations</td>
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<td></td>
<td></td>
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<tr>
<td>Analyze data and report results</td>
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<td></td>
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</tbody>
</table>
Appendix IV: Health Fair Planning Guide

Employee health fairs offer the opportunity for health education through the use of interactive displays, health screenings, games, and prizes. Health fairs also educate employees on the variety of community resources that are available to them. Most importantly, they demonstrate the organization’s commitment to the health and well-being of its employees.

Your company’s health fair can take many forms. You can tie it in with your annual health benefit fairs have a general health focus, or you might decide to spotlight one area of health concern (such as hypertension, cholesterol, or heart health). Invite various local health and wellness vendors to demonstrate their services. Including some biometric screening (e.g., laboratory work, blood pressure readings, and body weight determinations) will reinforce your focus on health.
## Timeline

The sample timeline table below will help you plan your fair.

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Action</th>
</tr>
</thead>
</table>
| 5 months or more prior to the health fair | • Get leadership support.  
• Find a health fair point person.  
• Determine the budget. |
| 4 months prior                  | • Organize a planning committee.  
• Determine your target audience.  
• Determine your organization's needs and interests.  
• Develop a health fair theme.  
• Develop incentives.  
• Create a vendor contact list.  
• Set a date, time, and location. |
| 3 months prior                  | • Send invitation letter and participation form to vendors (see samples).  
• Develop your internal marketing campaign. |
| 2 months prior                  | • Continue to invite vendors (you may have to follow up with a phone call).  
• Send vendor confirmation letters (see sample).  
• Develop a floor plan.  
• Order and arrange any event equipment you may need, such as tables, tablecloths, decorations, electrical outlets, and computer hook-ups. |
| 1 month prior                   | • Begin advertising to your employees.  
• Preregister employees for health screening if applicable. |
| 2 weeks prior                   | • Confirm all vendors and services that they will provide.  
• Continue to promote event.  
• Make signs and name tags for vendors. |
| Day of event                    | • Have team help set up tables, decorations, and other event items.  
• Have team in place to help with vendor needs and miscellaneous errands during the event.  
• Have post-event clean up team. |
| Post event                      | • Get aggregate data for any health screens, if available.  
• Survey vendors and employees.  
• Review feedback to see if your goals and objectives were met.  
• Send thank you letters to all vendors and volunteers. |
We can help!

As a PacificSource group, health-related newsletter articles, posters, and payroll stuffers are available to you at no charge. Topics include tobacco cessation, weight management, and much more.

PacificSource member fliers and brochures are also available at no charge and can help explain benefits to your employees.

Health Fair Promotion

The best way to ensure a good turnout for your health fair is to use a method of communication that works well in your organization. It also helps if employees can attend during their workday without having to take time off. Utilizing a consistent theme for all promotional materials will help promote and build recognition of the event. A key point to remember is that different people respond to different messages, so it’s important to use as many methods as possible to promote an event.

Promote the event early so that employees can plan for the fair. Remember that word-of-mouth is often the best method of communication within an organization. Therefore, you will want each person on your planning team to “talk up” the event. This also works well on the day of the event. Remind people to tell others about the event and encourage them to attend.

Marketing Suggestions:

• Posters
• Paycheck stuffers
• Emails
• Banners
• Employee newsletters
• Announcements at staff meetings

Incentives are also very effective in promoting employee attendance. Some health fair incentives may include:

• Paid time to attend the fair
• Free services, samples, and/or screenings at the fair
• Raffle prizes (you may ask vendors to donate these)
• Refreshments
Vendor Invitation Letter

Be sure to include your logo, or use company letterhead.

Current Date

[Business]
[Contact]
[Contact Address]
[Contact Address]

Dear [Contact],

You are cordially invited to join us as a presenting vendor at our [Your Business] Health and Wellness Fair on [Date] from [Time] to [Time]. Our health fair is geared to providing information on health and wellness, and spotlighting what is available in the community. Our more than [Number] employees are excited about this event.

If you have any questions, you may reach me by phone at [Phone Number]. Please fill out and return the enclosed Vendor Participation form as soon as possible, since space is limited. Once your participation is confirmed, I will send you more details and a map to our location.

Sincerely,

[Health Fair Point Person]
[Your Business]
Vendor Participation Form

Be sure to include your logo, or use your company letterhead.

Your Business Name and/or Event Name

Date, Time, and Location of Event

Participation Form

Would you like to attend this year’s health fair?  
☐ Yes, I will attend  ☐ No, I will not be able to attend

If no, would you like to be invited next year?  
☐ Yes  ☐ No

Name of business: ____________________________

Name of primary contact: ____________________________

Phone number of primary contact: ____________________________

Email address: ____________________________

Name of alternate contact: ____________________________

Alternate phone number: ____________________________

Number of representatives from your company: ____________________________

First and last names of all representatives: ____________________________

Please list anything you need us to supply (we will set up tables and chairs): ____________________________

Electrical outlet needed?
☐ Yes  ☐ No

Please list any other requests: ____________________________

Please return this form in the enclosed envelope or fax it back to us at [Number] by [Date]. Thank you for your response!
Vendor Confirmation Letter

Be sure to include your logo, or use company letterhead.

Current Date

[Business]
[Contact]
[Contact Address]
[Contact Address]

Dear [Contact],

I’m pleased to report that you are confirmed for the Health and Wellness Fair at [Your Business] on [Date] from [Time] to [Time]. The fair will be located in the [Specify] room at our [Specify] location at [Address]. We ask that you arrive between [Time] and [Time] on [Date] to set up. I’ve enclosed an information sheet and a map with directions. Also, if you require help unloading equipment, let me know at least a few days prior to the fair.

If you have any further questions or concerns, feel free to contact me at [Phone Number or Email]. We look forward to seeing you soon. Thank you for your participation!

Sincerely,

[Health Fair Point Person]
[Your Business]
Appendix V: Programs We Offer

Encourage Active Employees

The following programs are designed to engage your workforce in a health behavior change for a specific time period. The goal is to get people focused on a behavior (such as walking or eating more fruits and vegetables) that teaches them the skill set to continue with that behavior after the program has ended. Each program is geared to getting your employees engaged in improving their health while having fun.

Wellness Challenges/Campaigns:

- **Step It Up:** Research has shown that taking 10,000 steps a day (roughly five miles) will keep you on the path toward good health. This eight-week competition is designed to help you reach or exceed the recommended number of daily steps.

- **Walk Across Idaho/Oregon/Montana:** In this seven-week program, participants form teams of three or four and log all physical activity, and tally those results to log miles to walk across Idaho, Oregon, or Montana.

- **Couch To 5K:** This eight-week program encourages participants to get active. The challenge provides a training program for participants to start a cardiovascular exercise routine focused on increasing pace and distance.

- **5 A DAY:** This four-week challenge encourages participants to eat the recommended servings of fruit and vegetables each day.

- **Maintain Don’t Gain:** The holiday season is a time of year where we tend to pack on a few extra pounds. By encouraging good eating habits and physical activity, the Maintain Don’t Gain Holiday Challenge is a six-week challenge designed to help participants manage their weight during this festive time.

- **Stress Less Quest:** This six-week activity will help participants identify and reduce stress in their life. Participants will not only discover how they currently respond to stress, but they will also learn new techniques and put them into practice.

Looking for a custom program for your company? Contact us.

wellness@pacificsource.com
(541) 225-2811
All programs come with support materials that may include:

- a coordinator’s guide, which provides tips, timelines, and information for successful implementation
- a participant guide, which highlights the details of the program
- posters and fliers to post in high traffic areas
- email promotion
- weekly tips and tracking logs
- pre and post surveys
- tracking tools