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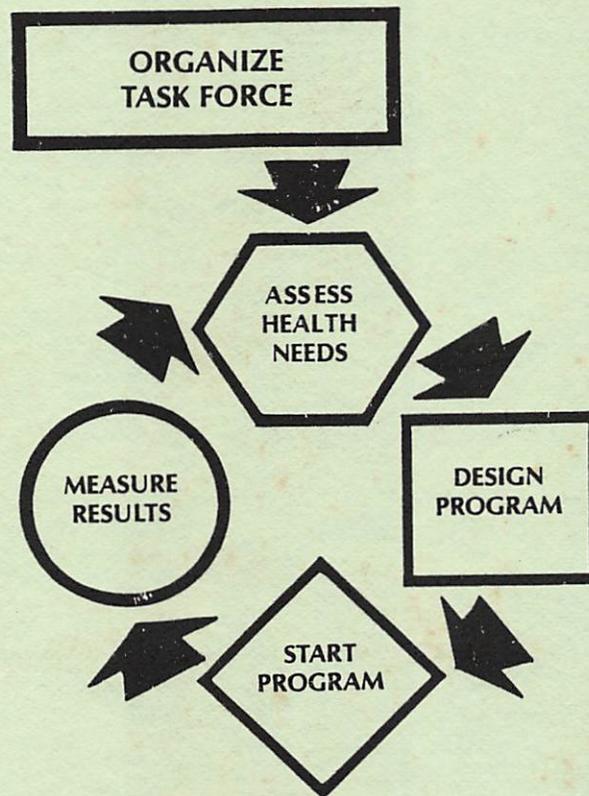
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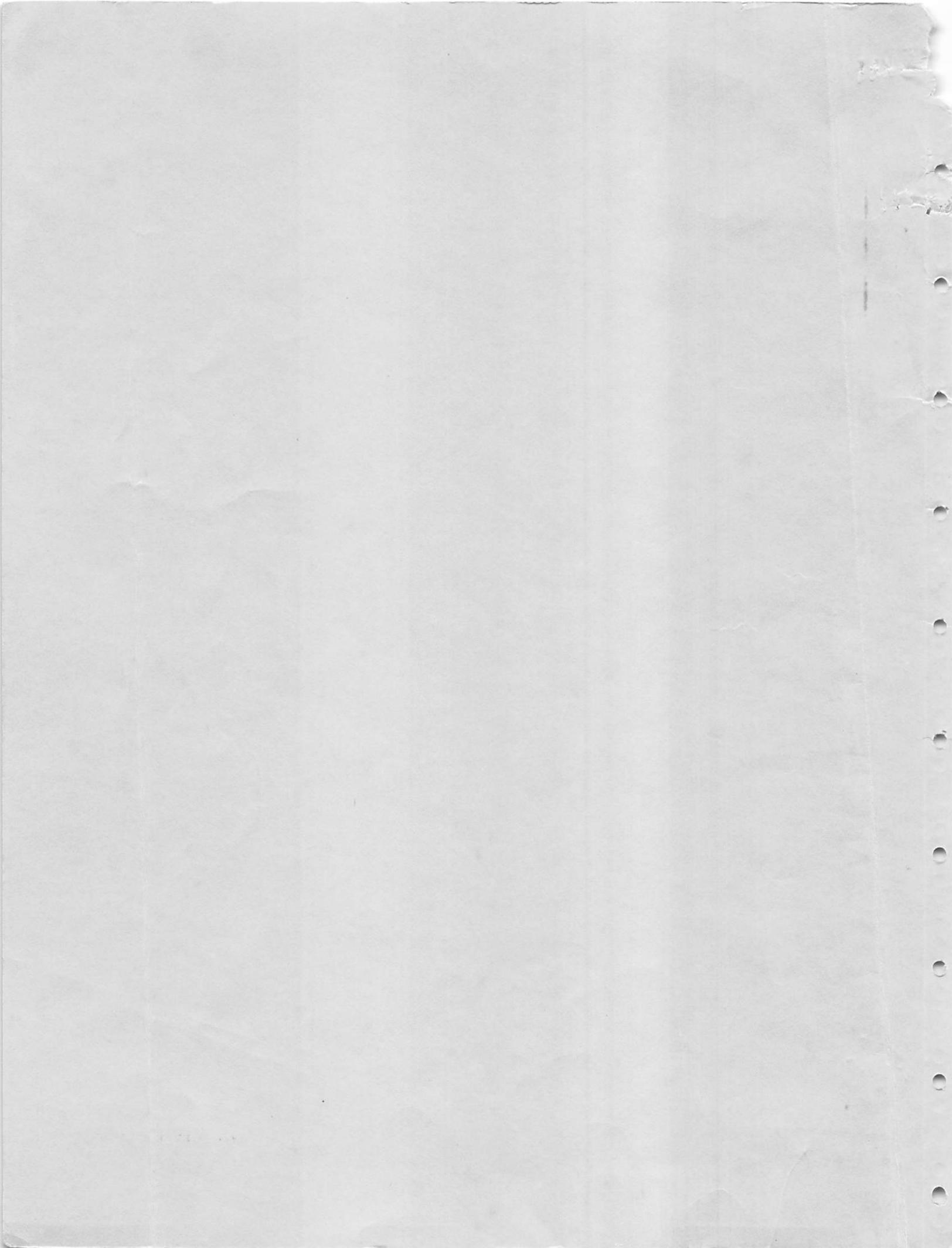
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# Employee Health Promotion:

## A GUIDE FOR STARTING PROGRAMS AT THE WORKPLACE

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# Foreword

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# Employee Health Promotion: A GUIDE FOR STARTING PROGRAMS AT THE WORKPLACE

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HealthWorks Northwest  
Puget Sound Health Systems Agency  
601 Valley Street • Seattle, WA 98109  
206/464-6143

January, 1983

# Foreword

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Employee Health Promotion: A Guide for Starting Programs at the Workplace is designed for use by employers who want to establish health promotion programs for their employees. Employee health promotion is an organized, on-going effort supported by the employer for the purpose of improving employee health and well-being. It involves a comprehensive approach to health and includes health education, occupational health and safety, environmental health and other related activities that encourage the adoption of healthy behaviors.

Health promotion consulting services and publications for employers are available through HealthWorks Northwest, a collaborative effort of the Puget Sound Health Systems Agency, Seattle-King County Health Department, Group Health Cooperative of Puget Sound and the Seattle Area Hospital Council. Employers who are interested in obtaining further information or assistance in developing employee health promotion programs may contact HealthWorks Northwest at 206/464-6143.

HealthWorks Northwest is partially funded by a grant from the W. K. Kellogg Foundation of Battle Creek, Michigan to the Puget Sound Health Systems Agency, Larry A. Thompson, Executive Director. Nancy E. Gertz is Project Director for HealthWorks Northwest, with Thomas L. Hall as Principal Investigator. This guide was completed under the editorial direction of Christine Sajewski, Project Coordinator. Dorothy P. Craig designed and wrote the document. Janet Hall was the principal researcher. Dawn Kragness was responsible for the word processing. Cover design and graphics were done by Bonoth & Associates.

The contents of this guide do not necessarily reflect the views of the W. K. Kellogg Foundation, Puget Sound Health Systems Agency, Seattle-King County Department of Public Health, Group Health Cooperative or the Seattle Area Hospital Council.

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# Why a Health Promotion Program?

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Organizations of all sizes, types and locations are burdened by the tremendous rising cost of health care for employees and their families. Medical insurance represents one of the largest components of employee benefits. It is estimated that by 1990, employers will be paying on the average more than \$3,000/year per employee for medical benefits alone.

Many organizations are discovering that health care cost containment, coupled with investments in improving employee health through health promotion programs, can result in significant health care cost reductions. Cost containment strategies attack the direct cost of health services. Health promotion programs, which are an important component of a cost containment strategy, assist in reducing employee use of health services. Moderating the costs while reducing the need for health services is clearly a critical strategy for today as well as being the future direction in health for employers. Health promotion is recognized as one of many strategies a company may undertake to reduce health related losses (risks) and increase worker satisfaction.

Health promotion programs at the workplace are designed to encourage employees and their families to adopt healthy behaviors. They are also directed at identifying occupational health and safety and environmental concerns at the workplace. Health promotion programs typically include classes or clinics for:

- Nutrition and weight control
- Smoking cessation
- Blood pressure screening and referral
- Stress management
- Occupational health and safety
- Accident prevention
- Lower back pain
- Hearing preservation
- Alcohol and drug education
- Physical fitness

Improvements in employee health can reduce the utilization of many high cost medical services, resulting in reduced health-related spending and:

- More favorable health insurance rates
- Fewer disability claims
- Decreased absenteeism
- Less employee turnover
- Increased productivity
- Improved morale
- Better labor/management relations

Both large and small organizations are realizing these benefits of sponsoring health promotion activities. Following are some examples.

- Canada Life Assurance sponsored a fitness program involving 534 employees in half-hour supervised exercise sessions three times per week. Results: Medical costs dropped by \$34 per employee during the first year. Absenteeism declined by 22% for the "high adherence" regular exercisers. Employee turnover for the participants decreased by 13.5%.
- New York Telephone Company, with 80,000 employees sponsors a comprehensive health care management program which includes smoking clinics, alcohol rehabilitation, back care and stress management. Results: estimated savings of \$2.7 million in absenteeism and disability and insurance claims costs in 1980.
- IBM screened 90,000 employees and found 41% had an unknown medical condition. Some of these were:

Diabetes	112
Cancer	89
Hypertension	3,484
Heart disease	3,750
Elevated glucose levels	10,061

- The Campbell Soup Company saved \$245,000 over ten years from a colon-rectal screening program. Through the screening program cases were identified and prevented.
- Kimberly-Clark Corporation offers an Employee Assistance Program for employers with chemical dependency problems. Results: a 43% reduction in absenteeism and a 70% reduction in accidents for a one year period following treatment for employees participating in the program.

Most statistics are available from large companies that have made significant investments in health promotion. However, positive results are not limited to large firms. Smaller organizations can also benefit from actively promoting employee health. For example, Scherer Brothers Lumber Company in Minneapolis, Minnesota, offered its 136 employees "well pay" incentives, free fruit for snacks, nutritious cafeteria meals, and an accident prevention program to reduce lumberyard injuries. Results: an absenteeism rate of 0.39% compared to an industry average of 3-4%.

Most companies relate their findings in a much less scientific and more subjective manner. For example, several years ago, a survey was conducted by Fitness Systems Inc., a California firm that provides fitness services to companies. A total of 600 organizations were contacted and of the respondents with fitness programs, 44% felt the benefits "substantially exceeded" costs. In most cases, rigorous evaluation had not been conducted.

Most companies involved in health promotion programs prefer to focus resources on program delivery rather than on planning or evaluation. Hence, planning is often overlooked, leading to future program problems, and evaluation data is limited, leading to unanswered questions like, "Well, what are the costs and effects of these programs?" that are difficult to answer.

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Questions about health promotion programs relating to cost and benefits are difficult to answer because all programs are different and results often cannot be measured in quantitative terms. Also, in some organizations, health promotion programs simply do not work well and/or are unnecessary.

This guide has been prepared to help your organization determine if a health promotion program would meet your needs and have the potential for success. It will also help you to establish a program that can achieve results similar to those mentioned above. The guide is designed to be used by a team of employees to:

- ° Assess the current costs of employee health care, injuries and accidents
- ° Identify employee health needs and interest in changing health-related behavior
- ° Plan a careful investment strategy to improve employee health
- ° Measure the return on investment

Chapter 1, "Getting Organized," describes how to set up a task force responsible for planning a health promotion program, getting it started, and measuring results.

Chapter 2, "Assessing the Need," outlines how to identify your company's health costs and employee needs, and set overall goals for the program.

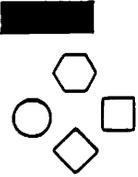
Chapter 3, "Designing the Program," shows how to plan activities, develop a budget, and encourage employee participation.

Chapter 4, "Starting the Program," describes the final steps of phasing-in the program and scheduling activities.

Chapter 5, "Measuring Results," presents a guide for evaluating the effect of the program on employee health and the company's health costs.

At the end of the guide, you will find a checklist summarizing these planning steps and blank worksheets for use in developing your company's health promotion program.

A well designed and managed health promotion program can benefit individual employees, their families, and the company as a whole. Using this guide will help you in your efforts to contain health care costs by designing an employee health improvement program that is cost-efficient and effective in meeting your organization's special needs.



# CHAPTER 1

## Getting Organized

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Introducing a health promotion program for employees is very similar to offering a new product or service to customers. You will need to identify and assign priorities to your employees' health-related needs and interests, develop a way to meet the needs, and then design a strategy for motivating employees to participate.

To help you begin, this chapter offers some ideas on organizing a marketing team--a group of employees responsible for planning a health promotion program and making sure it is carried out successfully. If your organization has an existing committee on cost-containment or health and safety, a new committee may not be needed. Having a team of employees organize a health promotion program is important because it will help ensure employee "ownership" of the program. This will enhance employee participation and commitment. Also, it is often true that the employees have their fingers on the "pulse" of other employees. Therefore, they are in a very strong position to know what is needed and what will work with other employees.

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### **STEP 1:** Form a health promotion team

The team should represent the entire organization involving upper and middle management, line employees and union representatives. Include people with a variety of skills--employees with knowledge or interest in nutrition, fitness activities, research, planning, budgeting, scheduling or evaluating. If you have one, include a staff physician, nurse or health educator.

Involving a variety of people at this stage is the first step in selling the program to employees.

One person should be designated as team leader and formally authorized to coordinate the overall planning and organizing of the program. This person should be perceived as a leader within the company, capable of managing the team's efforts and generating enthusiasm and participation among employees without resorting to heavy handed approaches that alienate other employees.

Step 1 Example	
	Name
Health Promotion Team	
Team Leader:	
Management representative:	
Personnel department representative:	
Occupational health & safety representative:	
Union representative:	
Clerical representative:	
Skilled trade representative:	
Engineering representative:	
Health professional:	

# Getting Organized

## STEP 2: Determine the team's "mandate"

The team should be clear about its "mandate"--why it has been formed, and what it is expected to accomplish. Find out which of the following concerns motivated your company to consider a health promotion program and in what priority. You may find that your company has an interest in the following concerns plus others that are not mentioned. Discover what these are.

Cost containment. The company believes improvements in health habits will lead to reduced health care costs due to improvements in absenteeism, turnover, early retirement, workers' compensation and disability claims.

Community/employee relations. The company believes health improvement programs create a more positive image among employees, their families and the community.

Human resource management. The company sees health promotion primarily as a way to improve the quality of work life--another incentive to attract prospective employees and a way to improve the morale and productivity of existing employees.

Personal motivation. The chief executive officer and/or others in senior management believe in the importance of good health and want to contribute to improved employee health.

Other.

A clear understanding of your mandate will help when you begin to design your health promotion strategy. For example, if the company is primarily concerned with cutting costs, a strategy aimed at absenteeism, insurance costs or disability claims will be more appropriate than a strategy aimed at encouraging general physical fitness. If the company wants quick results, a strategy aimed at accident prevention or hypertension screening will be more appropriate than a strategy to encourage weight reduction or alcohol rehabilitation which are likely to take two to four years before results are evident. If the company wants to boost morale or enhance its community image, a strategy involving large numbers of employees in physical fitness programs will be more appropriate than strategies to reduce high blood pressure or control substance abuse among a few employees.

Write a brief statement describing the team's understanding of its "mandate."

Step 2  
Example

Team Mandate

To design a health promotion program that will reduce company health care costs (especially costs due to absenteeism--reduced productivity, cost of replacement employees and paid sick leave).

# Getting Organized

## STEP 3: Identify the limits of the team's responsibility

The team should also clearly understand how far it can go in planning and carrying out a health promotion program.

Check which of the following activities the team has been authorized to perform. This can be the basis for the team's work plan showing the tasks to be completed, deadline for completion and persons responsible.

- \_\_\_ Identify current health care costs and utilization patterns
- \_\_\_ Assess employee health needs
- \_\_\_ Determine employee health interests
- \_\_\_ Plan health promotion activities
- \_\_\_ Plan ways to finance health promotion activities
- \_\_\_ Locate facilities and equipment
- \_\_\_ Schedule health promotion activities
- \_\_\_ Generate participation in activities
- \_\_\_ Coordinate program activities
- \_\_\_ Evaluate the program's results
- \_\_\_ Assess needs annually, and modify the program
- \_\_\_ Other

### Step 3 Example

#### Team Responsibilities

Within three months, prepare a proposed health promotion plan and submit it for review and approval

Coordinate to make sure planned activities get started

Conduct ongoing evaluation of program

After one year, submit recommendations for continuing, modifying or ending the program

# Getting Organized

## STEP 4: Determine what company resources are available

Find out the answers to questions like these:

What company resources are available to help the team's planning effort? (Examples include: work time for planning, meeting room, copy machine, office equipment, access to employees, access to cost information, funds to hire a consultant, support for attending a workshop on health promotion planning, company membership in a national health promotion organization.)

Is the company willing to cover all or part of the cost of health promotion activities?

Has the company allocated a certain amount of money or cost per employee for a health promotion program or is it the team's responsibility to determine what a program will cost?

### Step 4 Example

#### Company Resources

Planning team can meet during company time

Use of small conference room

Use of phone, copy machine

Estimated two hours/week of personnel manager's secretary's time

Estimated ten hours of benefits and personnel departments' time for research into costs

Company expects to pay about 75% of the cost of the health promotion program; remainder in user fees and community resources

In the first year, the company is prepared to spend a maximum of \$ \_\_\_\_\_ for direct costs and \$ \_\_\_\_\_ for indirect costs, subject to adequate justification

# Getting Organized

## STEP 5: Identify the "people resources" available

List the skills needed to plan and carry out a health promotion program. Then match these skills with team members. If an important skill is missing, perhaps someone who has this skill should be added to the group. Use Worksheet #1 in the Appendix as a guide for this exercise.

List other people in the company whose skills and experience you may want to draw on during the planning process.

Step 5 Example	Worksheet #1 People Resources	
	Team Member	Other Employees
Skills/Knowledge Needed		
Health/medicine		
Physical fitness		
Nutrition		
Program planning		
Research		
Budgeting		
Scheduling		
Evaluation		
Employee participation		
Securing funds		
Employee benefits (insurance)		

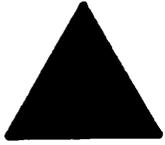
# Getting Organized

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## **STEP 6:** Identify who can approve the team's recommendations

The next three chapters outline steps for the team to follow in planning the health promotion program. The outline includes certain "decision points" when the team will submit progress reports to the key staff responsible for making the final decisions, with specific recommendations that can be accepted, modified or rejected. This procedure will help ensure that the team stays "on track" and within the bounds of possibility.

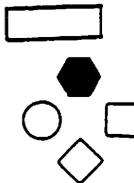
Identify the person or people who can authorize the team to proceed with each step of the planning process and who will ultimately decide to "go" or "no go" with the program.



## Getting Organized DECISION POINT

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Write a progress report describing the "mandate" of the team listing the company resources the team will need to do its work, and outlining the steps the team expects to take next. Request approval of the "mandate" and authority to begin assessing health costs and needs as described in Chapter 2.



# CHAPTER 2

## Assessing Needs

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Careful planning is the key to establishing effective employee health promotion programs, and good planning begins and ends with an assessment of needs.

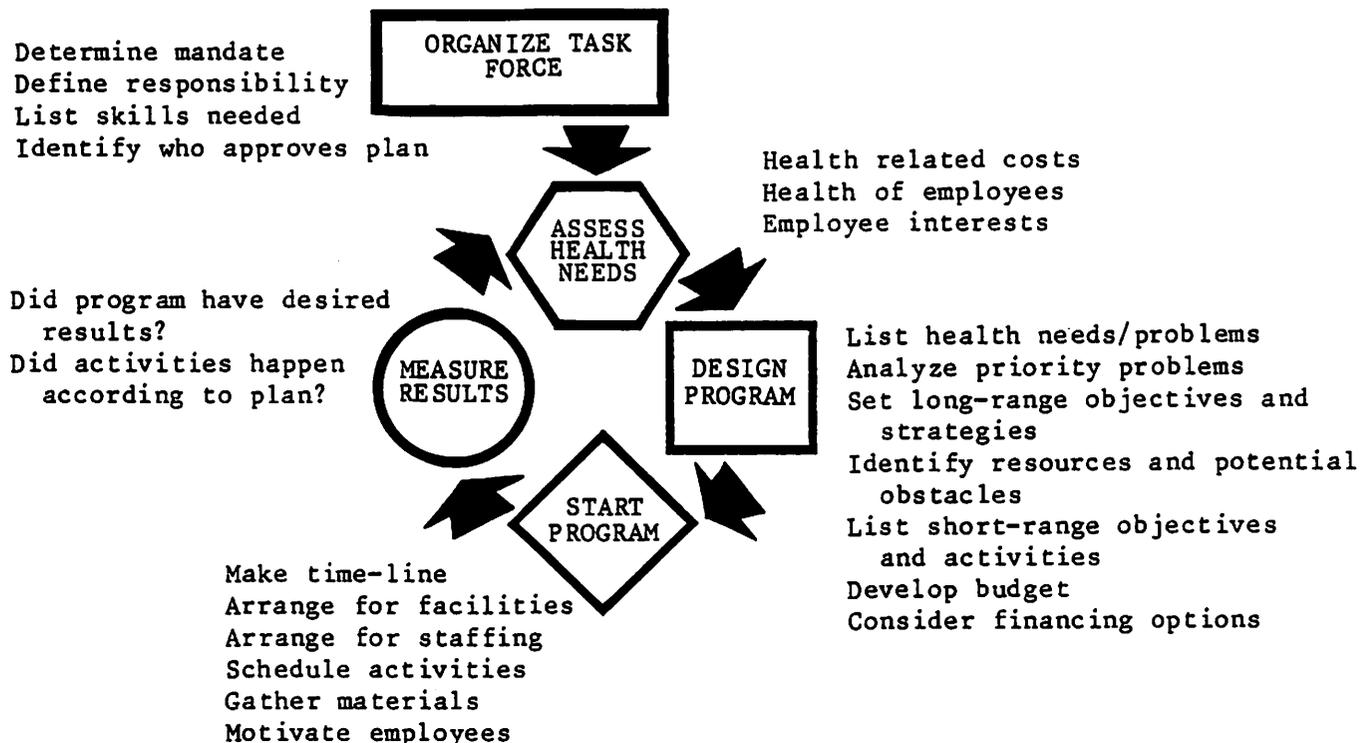
This chapter suggests ways to gather three basic categories of information that you will need before you can decide what kinds of health promotion activities are most appropriate for your company. You will need to find out:

- Current health-related costs and utilization patterns
- Current employee health habits and problems
- Interests of employees at all levels in the company

You can use this information to set overall goals for the health promotion program and then to plan and carry out specific activities.

After your activities have been underway for at least six months (or more realistically, a year) you can go back and collect the same information as a way of evaluating whether your program has been successful in meeting the goals you have set.

Effective health promotion planning is a continuous cycle as illustrated below:



As you design ways to collect information about current health costs and needs, remember that you'll need the same information later on to measure the program's results. Chapter 5 presents ideas about how to do this.



# Assessing Needs

## STEP 1: Determine current health related costs

Many employers are unaware of how much employee health problems cost the company. To determine health care costs, you will need to collect information on how much your company has spent and is spending on health related costs such as health insurance, disability insurance, and absenteeism. Use Worksheet #2 in the Appendix as a guide.

The information you collect on costs will help you identify goals for the health promotion program. For example, high worker compensation payments may imply a need for more accident prevention education or removal of potential hazards in the workplace. High absenteeism rates may indicate low morale and low productivity which can be improved by involving employees in physical fitness or stress management programs. High absenteeism on Mondays or Fridays may suggest a problem with alcoholism or drug abuse and a need for educational or rehabilitation programs.

Every company collects different types of data in different ways. Some information will be readily available, while other information may not be maintained at all. Insurers, both life and health, are good sources of data but should be approached with clear requests for specific information. Some insurers and brokers may also be helpful in establishing a health promotion program at your company.

The key is to obtain as much useful information as possible. When the well runs dry, use what you have been able to obtain and identify areas for future data collection.

### Step 1 Example

#### Health Costs

##### Background:

Company has 510 employees  
359 male  
151 female

61 age 55 and over  
153 age 45-54  
201 age 35-44  
73 age 25-34  
22 under age 25

##### Absenteeism:

1981 - 2828 days  
5.5/employee  
Industry average 4.5 days/employee

1982 - 3723 days  
7.3/employee

##### Health insurance premiums:

1980 - 30% increase  
1981 - 42% increase  
1982 - 38% increase



# Assessing Needs

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## STEP 2: Assess the current health status of employees

Contact the personnel office or medical department, if your company has one, to obtain any existing information about common health problems and symptoms that may contribute to high absenteeism or turnover rates. Throughout all data collection, and later in your evaluation efforts, respect completely the employees' rights to privacy and confidentiality.

It may be useful at this point to ask each employee to fill out a confidential "health risk appraisal" questionnaire, with information about family history and health habits, e.g., use of tobacco, alcohol and drugs; eating patterns; and exercise. These appraisals are very helpful tools for identifying employees who are at high risk for such conditions as heart disease, cancer, hypertension and diabetes, and also for helping motivate many employees to take better care of their health. Sometimes an overall company profile can be obtained, which can be very useful in health promotion planning.

Health risk appraisals are designed to identify and measure risks to an individual's health, estimate an individual's "health age" based on those risks, and suggest the extent to which changes in lifestyle (e.g., exercising regularly) can reduce health risks.

Many health risk appraisal systems are available. Most consist of two or three page questionnaires to be completed by employees. Some are sent back to the appraisal company for a

computerized assessment; others are scored by the employee. Prices vary from about \$7 to \$40 per employee, depending on the completeness and complexity of the appraisal and on the volume of the order.

Some risk appraisal companies offer an aggregated "corporate" profile, which identifies major health risks that the corporation is experiencing. These profiles can be very useful for corporate planning.

Individual risk appraisals completed by employees are strictly confidential. Individual computerized results are usually mailed to the employee's house. In the aggregate corporate reports, individual employee names do not appear.

Health risk appraisals are most effective when accompanied by follow-up sessions to explain the results of the appraisal. Referrals should be made for health promotion activities that employees can "plug into" to facilitate and support adoption of healthy behaviors.

A comprehensive listing of health risk appraisals is available in the following government publication:

Health Risk Appraisals: An Inventory, DHHS (PHS) Publication No. 81-50163, June 1981, Prepared by National Health Information Clearinghouse, P.O. Box 1133, Washington, D.C. 20013.



# Assessing Needs

An alternative to a health risk appraisal is to compare the characteristics of your work force (age, sex and race) with national norms for major health risks in these groups. For example, heart disease is the most common cause of death in men 35-54 years of age. You can assume for planning purposes that the same major cause of death applies to your male employees in that age group.

Information about employees' current health status will help you set goals for your program. For example, a large number of employees whose appraisals indicate an elevated risk of heart disease may suggest a need for a cardiac risk reduction program involving nutrition education, exercise and fitness classes and blood pressure screening.

Once you have gathered information on employees' health, the next step is to find out what, if anything, employees are interested in doing to improve their health.

Step 2  
Example

Health Status

High blood pressure:

20 employees age 55 and over (33%)  
54 employees age 45-54 (35%)  
92 employees age 35-44 (46%)  
20 employees age 25-34 (27%)  
8 employees under age 25 (36%)

Smoking:

Heavy (more than 1 pack/day) 76 (15%)  
Moderate (1 pack/day or less) 107 (21%)

Overweight:

Male 86 (24%)  
Female 48 (32%)

Infrequent exercise:

38 employees age 55 & above (62%)  
113 employees age 45-54 (74%)  
131 employees age 35-44 (65%)  
29 employees age 25-34 (40%)  
7 employees under age 25 (32%)



# Assessing Needs

## STEP 3: Survey employee interests

The biggest mistake that is made in health promotion planning is to assume that employees share the planners' idea of "health needs." Your health promotion program is not likely to be effective unless employees want to improve their health and feel that participating in the program will help them. For example, weight control classes and aerobic exercise for overweight employees are not likely to be popular if the employees are not concerned about their weight or wouldn't be caught dead in gym shorts!

Involving employees on the planning team, and asking for ideas before you plan the program will help ensure employee involvement in the activities you plan.

Distribute an employee interest survey like Worksheet #3 (located in the appendix) to identify the activities employees are likely to participate in and the preferred times and locations for such activities. Remember to include questions about activities for employees' families. Involvement of family members can reinforce the company's health promotion efforts and cut costs further. (Benefits for family members account for an average of two-thirds of health plan costs.)

Another way to involve employees and generate interest is to hold employee forums or brown bag lunches to discuss ideas about possible health promotion activities and concerns about health hazards in the workplace.

Step 3 Example	
Employee Interests	
Would participate in exercise program	223 (44%)
Would attend classes on:	
Nutrition	86 (17%)
Weight loss	53 (10%)
Smoking	69 (13%)
Want to know nutritional content of cafeteria food	134 (26%)



# Assessing Needs DECISION POINT

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Once you have gathered information about health costs, needs and interests, write one or more overall goals for the program.

Submit another progress report summarizing the findings of your needs assessment, recommending approval of the overall goals for the program, and requesting authority to begin designing the program as outlined in Chapter 3. (Your actual report will probably include more detail than shown in the example.)

Example  
Decision Point

MEMO

To: President  
From: Chair, Health Promotion Planning Team  
Re: Progress Report

1. Our study revealed:

A high percentage (25%) of our employees have a high risk of cardiovascular disease because of high blood pressure, smoking, overweight and lack of exercise. (Our insurance representative tells us we could obtain more favorable rates if this percentage was reduced.)

A high absenteeism rate of 7.3 days/employee, compared to the industry average of 4.5.

There is strong employee support for a health promotion program. Our survey indicated 223 employees would participate in an exercise program, 53 in weight reduction classes, and 69 in quit smoking clinics.

2. We believe the following are realistic goals for the first year of program operation:

To contain health insurance costs by improving the cardiovascular health of employees.

To increase productivity and decrease costs by reducing absenteeism.

3. We request your approval of these goals and ask that you authorize us to design a health promotion program to reach these goals.



# CHAPTER 3

## ■ Designing the Program

The easiest way to plan a health promotion program is to enthusiastically organize a few activities that sound interesting and fun. Unfortunately, while the activities may be popular, the results may be disappointing. By moving ahead too quickly, you may leave the employees "in the dust" and your programs with low participation. Good program design requires carefully examining the needs you have identified, setting some long range objectives, developing strategies to meet the objectives, and identifying needed resources--always keeping in mind the overall program goals. Once you have obtained approval on the objectives and strategies, then you can plan some activities. You can also develop a budget for the facilities, equipment, materials, instructors and other resources you will need. Finally, you can plan ways to finance the program and motivate employees to participate.

### **STEP 1:** List health needs or problems

Your needs assessment has probably given you a good idea of the most common health needs or problems encountered by employees. Make a list of these needs, using Worksheet #4. If the list is long, you may want to group similar needs together. Give each need or problem a priority--high, medium or low. The priority may be based on the number of employees experiencing the need, the severity of the problem, or the relationship of the need to the overall program goals.

Step 1  
Example

Worksheet #4  
Health Needs/Problems

High number of employees (25%) have an elevated risk of cardiovascular disease (high blood pressure, overweight, inadequate exercise, heavy smoking)

High absenteeism (morale problem?)

Increasing number of accidents

Alcoholism

Low back problems

Eye strain (workers using video screens)

# Designing the Program

## STEP 2: Analyze high priority problems

This step allows you to slow down the planning process in order to keep from jumping to conclusions about the best way to meet a certain need or solve a certain problem. For example, one of your high priority needs may be to reduce the risk of heart disease among company employees and their families. In your haste to organize a fitness program with aerobics and jogging, you could easily overlook occupational health hazards such as high noise levels and crowded office space which are causing stress for employees, thereby contributing to their risk of heart disease.

For each of your high priority needs, ask questions such as those shown below, using Worksheet #5 as a guide:

How many employees are experiencing this problem?

What are the characteristics of employees experiencing this problem (older males, young females)?

What may be causing this problem (employee health habits, family situation, work environment)?

How many people are affected by this problem (other employees, family members, others in the community)?

What is the overall effect of this problem on employees, on the company, on the community?

Step 2  
Example

Worksheet #5  
Problem Analysis

Problem: High Risk of Cardiovascular Disease

How many employees: 127 (25%)

Employee characteristics:

all age groups  
especially age 35-45  
more men than women

Possible causes:

smoking, overweight, lack of exercise, poor nutrition, stress on job, financial worries, family problems

Others affected:

co-workers  
families

Overall effect:

high health insurance costs  
high absenteeism  
additional stress for families, co-workers

# Designing the Program

## STEP 3: Set long range objectives and strategies

Now that you have a better understanding of employee health needs and problems, you can develop long range objectives that state specifically what results you want to achieve within a certain number of years. For each problem, write a long range objective, using Worksheet #6 as a guide. The objectives should reflect your realistic answers to questions like these:

Nature of the desired results  
(What do you want to happen?)

Extent to which the problem or need will be reduced  
(How much change will occur?)

Target group to be affected  
(Who will change?)

Time frame for meeting the objective  
(When will the results have occurred?)

Step 3  
Example

Worksheet #6  
Long Range Objectives/Strategies

Problem: 25% of employees are at high risk of cardiovascular disease.

Long Range Objective: Within five years, only 10% of employees will be at high risk of cardiovascular disease.

Strategy: Company sponsors a program including regular blood pressure tests with referral and follow-up; exercise and nutrition classes; and quit smoking clinics.

Next, use the insights gained from your problem analysis to develop an overall strategy for meeting the objective. Begin by brainstorming all the possible strategies you can think of. Ideas that seem outlandish or totally unrealistic may inspire a strategy that is truly innovative and appropriate for your particular situation. After you have collected a number of ideas, begin narrowing the list until you have agreed on a strategy that will be effective in meeting the long range objective.

In selecting strategies, keep in mind your original "mandate" and the overall goals of the program.

# ■ Designing the Program

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## **STEP 4:** Identify resources needed and potential obstacles

For each strategy, identify the resources you will need, such as instructors, facilities, equipment, and educational materials. Estimate the cost of these resources.

Smaller companies may want to consider sharing health promotion staff, facilities, equipment, films or video tapes with other firms. For example, several companies might jointly plan a health promotion program for their employees, sharing the services of a health promotion coordinator, facilities and the cost of educational materials.

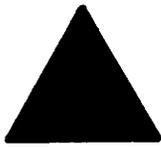
Next, identify the potential obstacles that may have to be overcome in order to implement successfully these strategies (for example, you need a gym and the nearest one is three miles away; or the best available program for smoking control is exorbitantly expensive). Worksheet #7 is a guide for this exercise.

# Designing the Program

Step 4  
Example

Worksheet #7  
Resources Needed/Potential Obstacles

Resource	Estimated Cost
<u>Personnel</u>	
Nurse	
Instructors	
<u>Facilities</u>	
Classroom	
<u>Equipment</u>	
Blood pressure devices	
Stethoscopes	
Weight scale	
<u>Materials</u>	
Educational materials	
Office supplies	
<hr/>	
<u>Potential obstacles</u>	<u>Possible solutions</u>
Nearest gym at school 3 miles away	Bus employees
Lack of employee interest	Promotional campaign
Lack of management support	Orientation to health promotion and educa- tional campaign
Not given authority to carry out responsibilities	Discuss with person/ people ultimately responsible
Employer liability for injuries	Consult with company's liability insurance carrier
Unions	Meet with union representatives to try to resolve anticipated problems/objections and to identify ways of helping
Justification by bottom line measures	Educational campaign, evaluation



# Designing the Program DECISION POINT

By this time, the planning team will have a clear idea of the program it would like to organize, what the program can be expected to accomplish and the resources that will be needed. Submit a progress report summarizing the high priority problems, long-range objectives, proposed strategies, resources needed, potential obstacles and estimated total cost. The report should also recommend approval of the program concept (long-range objectives and strategies) and the total funds the company will make available for the program. The report should request authority to develop specific program activities, budget and financing options, and a strategy for motivating employees, as outlined in the next few steps.

At this time the company may decide that program goals, needs, interests, and resources are so out of phase with each other that perhaps health promotion programs are not likely to succeed. It is preferable to wait for a better climate for these programs than to begin them on the wrong foot, losing both money and enthusiasm. If this is the case for your organization, begin the planning process again in six months or one year and see what happens.

## Decision Point Example

### MEMO

To: President  
From: Chair, Health Promotion Planning Team  
Re: Progress Report

1. Since our primary goal is to contain health insurance costs, our first priority problem is the large number of employees who are at "high risk" of cardiovascular disease.
2. Our long-range objective is to reduce the percentage of "at high risk" employees from 25% to 10% within the next five years. Our general strategy is to sponsor a health promotion program including regular blood pressure screening, with referral and follow-up; opportunities for regular exercise; classes in nutrition and weight control; and clinics to help employees stop smoking.
3. Needed resources include access to a gym, a classroom, trained persons to administer blood pressure tests, class instructors, educational materials and office supplies.
4. We estimate that the costs to the company for such a program would be well within the specified maximum for the year (see attached preliminary budget).
5. If you concur with this general direction, we will proceed to plan specific program activities, prepare a detailed budget, list options for financing the program and plan for motivating employees to participate.

# Designing the Program

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## **STEP 5:** List specific activities and short range objectives

For each strategy, use Worksheet #8 to list the specific activities you will organize and set a short range objective for the first phase of the program. The short range objectives should be realistic, based on the number of people you expect to participate in the activities.

The short range objectives should be "smaller versions" of the long range objectives. For example, if a long range objective is to reduce the number of older male employees who smoke by 50% within five years, the short range objective might be to reduce the number by 15% within the first year (based on the number of employees expected to stop smoking as a result of the company-sponsored smoking cessation clinic).

Following is a list of creative, innovative activities that have been developed and successfully conducted by a variety of organizations across the country as part of their employee health promotion programs. This list has been included here to inspire you to develop innovative programs for your employees.

Stair climbing competition (especially appropriate for health promotion programs in tall buildings)

"Quiet rooms" for employees to seek refuge from the work environment during lunch and breaks

Family health fairs to encourage employees and families to participate in health promotion activities

"Headquarters Hustle"--a map of routes employees can walk or jog, including distances

"Heart Healthful Menu" lists those items in the cafeteria that are recommended for healthy diets

"Spousekit" information on health promotion distributed to spouses

"Health Passport" distributed to each employee to record results of health exams and progress in improving health habits (e.g., blood pressure, alcohol consumption, weight reduction, level of exercise, etc.)

Walk/jogathons

Cooking classes emphasizing healthy nutritional habits

Brown bag lunches with guest speakers discussing various health topics

Fitness trails with running courses and exercise stops

Monthly health newsletters distributed to employees

# Designing the Program

Step 5  
Example

Worksheet #8  
Short-Range Objectives/Program Activities

Long-Range Objective: Within five years, only 10% of employees will be at high risk of cardiovascular disease.

Short-Range Objective: Within one year, the percentage of employees considered at high risk of cardiovascular disease will be reduced from 25% to 18%.

<u>Activities</u>	<u>Number of Expected Participants</u>
Blood pressure tests	194
Smoking clinic	75
Nutrition class	125
Weight loss clinic	75
Exercise program	200

# Designing the Program

## STEP 6: Develop a budget

Use Worksheet #9 to list the specific resources you will need for the planned activities (including instructors, facilities, equipment, educational

materials and supplies). Develop a detailed budget for each activity and a total budget for the overall program.

Worksheet #9  
Sample Budget

<u>Activity</u>	<u>First Year Costs</u>
<b>Planning/administration</b>	
Committee meetings	
10 members	
24 meetings @1.5 hours @\$15	\$ 5,400
Staff training, meetings with other companies, etc.	
40 days @\$25,000 annual salary	4,200
Supervision	
1 half-time employee @\$30,000	15,000
Data collection	
10% of 1 employee's time @\$25,000	2,500
Monthly newsletter	
500 employees @\$10	5,000
Health risk appraisal	
500 employees @\$10 x 85% response	4,250
Miscellaneous supplies	
copying, postage	2,500
<b>Program expenses</b>	
Blood pressure screening held once each month	1,200
Smoking cessation clinic	
88 participants @\$30	2,640
Weight loss clinic	
75 participants @\$30	2,250
Physical fitness program	
150 participants @\$20	<u>3,000</u>
<b>TOTAL</b>	<b>\$47,940</b>

# Designing the Program

## STEP 7: Consider financing options

By now you should have a realistic idea of how much your program will cost and how much the company and employees are willing to contribute. It is time to consider which financing arrangement is most appropriate for your company's health promotion program.

Some companies make a substantial investment in a health promotion program, paying for all or part of the costs. Others rely on making free or low-cost community services more accessible to their employees. Most companies ask employees to share part of the costs as a way to encourage employee commitment to improving their own health.

Here are a few examples of possible financing arrangements:

Company and employee share the time required for the program (e.g., one-half hour on work time and one-half hour after work time)

Company pays entire cost of company-sponsored program for employees and their families

Company shares cost with employees (e.g., employees charged a fee covering 50% of the cost)

Company shares cost with employees and gives a refund to those who successfully complete the program

Company offers program free to employees and at reduced cost to employees' families

Company pays all or part of the cost of health promoting activities not sponsored by the company (e.g., health clubs, weight loss programs)

At this point, it is also a good idea to review your health insurance package to be sure that your health promotion activities are compatible with the insurance coverage the corporation offers employees. For example, if you plan to offer/promote alcohol/drug abuse services (inpatient or outpatient) then these services should be covered as part of the employee's existing insurance plan.

It is also advisable to review the personnel policies and general operating procedures of the company for compatibility with the health promotion program. For example, if you plan to offer longer lunches instead of an afternoon break, the policies should reflect that flexibility.

### Step 7 Example

#### Financing options

#### 1. Direct company costs:

Coordinator (part-time)  
Nurse or trained persons to take blood pressure (hourly basis)  
Blood pressure equipment  
Educational supplies  
Office supplies

Subsidize fees for employees to attend smoking and weight control clinics at community college

#### 2. Employee costs:

Partial fees for classes

#### 3. Shared costs:

Share cost of program coordinator and van for transportation to gym with United Products, Inc.

#### 4. Community resources:

Program consultation and educational material free from local chapter of American Heart Association

# Designing the Program

## STEP 8: Motivate employees to participate

Motivating people to change personal habits is difficult, even when their own health and safety is at stake. Companies that actively encourage good health and safety habits can significantly affect employee attitudes and behavior because of the nature of the work place. At work, employees can find convenient opportunities for exercise and health education, group support for their attempts to change poor habits, and fellow-workers who can model good health habits.

More direct incentives can also be used, such as time off for exercise classes, a salary differential for employees who do not smoke at work, a bonus for employees who quit smoking for a year, rebates for employees who change their health habits and decrease health care utilization, and awards for successfully completing a program, or running/swimming/cycling a certain distance.

For any incentive system adopted by the company, a formal policy should be established and distributed to all employees.

To make a good start and continue building interest and involvement, employees must be kept aware of the program as it is being planned, before it begins, during each activity and after an activity is completed. Here are some ideas for involving and motivating employees at each stage of the program:

### During planning

- Involve employees in task force
- Survey employee interests
- Conduct employee forum or brown bag to solicit ideas

### Before starting

- Stage kickoff event with top management participation

- Announce program in employee newsletter
- Post flyers or include notice in pay envelope
- Distribute policy on incentives
- Make special invitations by mail or phone
- Organize specific health programs for certain months

### During the program

- Display educational materials
- Give personal recognition of individual achievement (e.g., "You're up to running a mile a day--congratulations!")
- Place names of participants in newsletter

### After the program

- Give recognition and/or awards for completion
- Continue formal and informal reinforcement of good health behavior (e.g., "We're treating you to lunch to celebrate your six months without smoking!"; certificates of continuing achievement; names in newsletter)

### Step 8 Example

#### Incentives

Transportation to high school gym after work

Flexible lunch hours for exercise classes

Contests for designing health posters

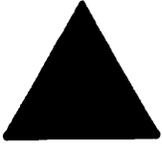
Classes scheduled on company time

Recognition in company newsletter for:  
completing classes

exercising regularly for three months

quitting smoking

Trophies for maintaining good health habits for one year (use old bowling trophies!)



# Designing the Program DECISION POINT

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Use Worksheet #10 as a guide for submitting a summary of your program plan, including:

- Overall goal
- Long range and short range objectives
- Strategies
- Activities and budget
- Financing plan
- Employee involvement plan

Request approval of the plan and budget, and authority to begin the program; schedule activities, arranging for instructors, facilities, equipment, materials and supplies, and selling the program to employees as outlined in Chapter 4.

# Designing the Program

## Worksheet #10

### Health Promotion Plan

#### Overall Goal:

To contain health insurance costs by obtaining more favorable rates.

#### Long-Range Objective:

Within five years, only 10% of employees will be at high risk of cardiovascular disease.

#### Short-Range Objective:

Within one year, the percentage of employees considered at high risk of cardiovascular disease will be reduced from 25% to 18%.

#### Strategy:

Company sponsors a program including regular blood pressure tests with referral and follow-up; exercise and nutrition classes; and quit smoking clinics.

#### Activities:

Blood pressure tests  
Smoking clinic  
Nutrition class  
Weight loss clinic  
Physical fitness program

#### Budget:

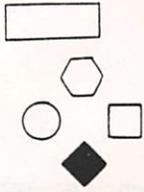
	Annual cost
Planning/administration	\$38,850
Programs:	
Blood pressure screening	1,200
Smoking clinic	2,640
Weight loss clinic	2,250
Physical fitness program	3,000
TOTAL	\$47,940

#### Financing Plan:

1. Company pays direct program costs of company-sponsored activities (staff, equipment, supplies) and reimburses employees 50% of fees for off-site classes.
2. Employees pay fee based on 50% of cost for company-sponsored activities and 50% of fee for off-site classes.

#### Employee Involvement Plan:

1. Health promotion committee representing employees
2. Publicity each quarter before classes begin
3. Recognition in monthly newsletter
4. Awards for completion of classes



# CHAPTER 4

## Starting the Program

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You may use this guide to design a comprehensive health promotion program with a wide range of activities for all employees in many locations, or to design a more modest program with a few activities in one or several locations. Whatever the scope of your program, you will need to decide whether to start all at once or phase it in gradually. Then you can proceed to make the arrangements for facilities, staffing and educational materials.

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### STEP 1: Make a time-line

If all of the planned activities begin at the same time, they can be offered to everyone in the company. However, for most situations, the preferred approach is to phase in the program so you can test your strategy and correct any problems. The phase-in approach also allows employees time to become "oriented" to health promotion, and enables you to build the program's momentum steadily rather than beginning (and ending) with a big splash.

Make a time-line showing the major events along the way to full operation of your program. For example, you may start one physical fitness class in one branch office for three months, evaluate how it went, then expand the activity to other branches. Or, you may start one new activity each month, so that by the end of six months you have six activities underway.

The time-line can be as detailed as you like, including individual tasks to be accomplished before an activity begins.

It is important that visibility and publicity are consistent throughout the program. Big kick-offs with a drop-off afterwards can lead to drops in participation. Phasing-in programs, always having a new card to play, is a "healthier" strategy than a blitz of programs.

Worksheet #11 is one tool for this type of planning.

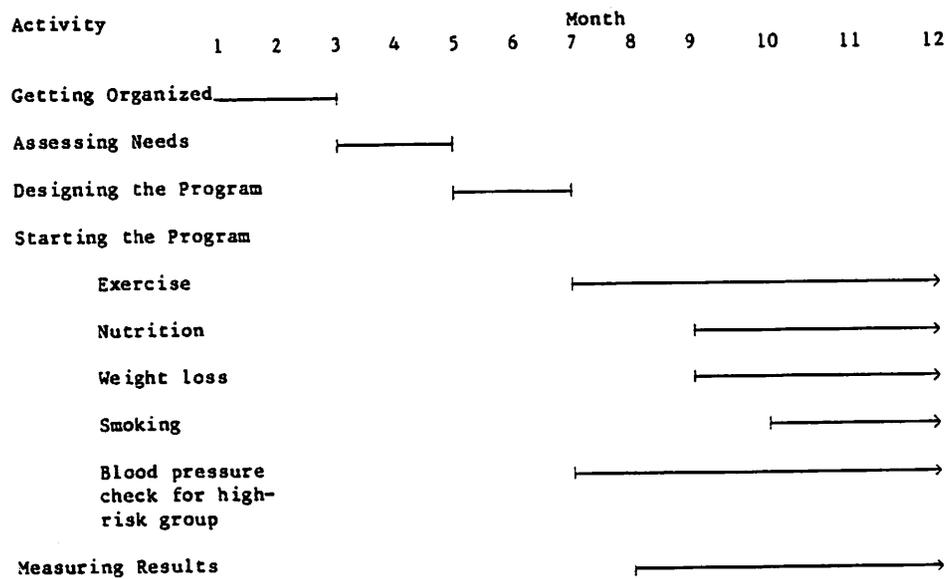


# Starting the Program

Step 1  
Example

## Worksheet #11

### Schedule for Phasing In Health Promotion Program





# Starting the Program

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## STEP 2: Arrange for facilities

A wide variety of facilities can be used for health promotion activities. By this time, you have probably surveyed your company to find out what conference rooms, lunch rooms, or large exercise areas are available. Other community facilities can also be tapped, such as local YMCAs, spas, health clubs, school gyms or community pools.

Step 2
Example
Facilities
<u>Blood pressure screening:</u> Small conference room
<u>Nutrition class:</u> Large conference room
<u>Aerobics class:</u> Lunchroom
<u>Team sports:</u> High school gym
<u>Swimming:</u> Community pool
<u>Running:</u> Local park
<u>Smoking and weight loss clinic:</u> Community facilities



# Starting the Program

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## STEP 3: Arrange for staffing

Staff for health promotion programs can include physicians, nurses, exercise physiologists, health educators, consultants and interested volunteers.

Using your own company staff has the advantages of convenience and continuity. Outside staff may offer additional flexibility and can sometimes be used to develop company resources. For example, the American Cancer Society offers smoking clinics that encourage successful employee participants to serve as volunteer leaders for ongoing company programs.

Step 3  
Example

### Staffing

Blood pressure tests:  
Nurse (hourly basis)

Exercise:  
Part time coordinator  
(shared with United Products)

Nutrition:  
Mary Johnson (clerical supervisor, former nutritionist)

Smoking clinic:  
American Cancer Society provides instructor for first series of classes; graduates teach subsequent classes

Weight loss clinic:  
Employees attend sessions sponsored by Overeaters Anonymous



# Starting the Program

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## STEP 4: Schedule Activities

Convenient scheduling is critical to the success of health promotion activities. Events scheduled on company time or around the lunch hour are likely to be most popular. Your company may allow employees to start work a half hour earlier so they can jog, play tennis or attend aerobics classes during an extended lunch hour. Or, the company may allow employees to spend a certain amount of company time in an alcohol rehabilitation or stress management program. If the company doesn't want to use work time for health promotion activities, you may have to schedule activities immediately before or after work.

Be sure to schedule activities so employees on all shifts have an opportunity to participate.

Step 4  
Example

Schedule of Activities  
September-December

Exercise:

Morning run T Th 7:00 a.m.  
Afternoon run M W F 5:15 p.m.

Aerobics M W F noon  
T Th 5:15 p.m.

Nutrition:

Class T Th noon (brown bag)

Blood pressure tests:

Beginning in January, 3rd  
Thursday of month, 1:30 p.m.



# Starting the Program

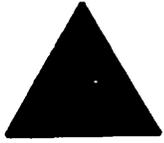
## STEP 5: Gather educational materials

A key part of your health promotion program is providing employees with information they can use to make intelligent choices about habits which affect their well-being.

A wide variety of free or low cost educational materials are available to increase employee awareness and knowledge of good health habits.

Materials such as brochures, newsletters, films, slide shows and video tapes are available through organizations such as the American Cancer Society, American Red Cross, American Heart Association, and local health departments.

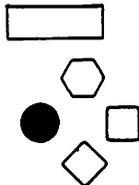
Step 5 Example	Educational Materials				
	Topic	Brochures	Films	Slides	Video
	General health:	from the local health department			
	Smoking:	from the American Cancer Society			
	Nutrition:	from the state dietician association			
	Weight loss:	from the local health department			
	Exercise:	from the local YMCA/YWCA			



## Starting the Program **DECISION POINT**

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At this stage, all the decisions for getting the program started have been made. Future decisions will have to do with whether the program should be continued or expanded; whether the objectives should be more realistic; or whether strategies, activities, or budget should be modified. Chapter 5 offers some suggestions for how to gather the information you will need to make these decisions.



# CHAPTER 5

## Measuring Results

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To successfully market a new product or service for your customers, the initial planning must be followed by careful evaluation of results. Operating a successful health promotion program follows the same cycle: planning begins by assessing needs and designing a program to meet the needs; planning continues in an ongoing cycle of measuring results, reassessing needs and adjusting the program accordingly.

After you have designed the initial program, you will need to build in ways to generate information so you can assess:

- Whether the program is having the desired results
- Whether the activities are happening according to plan
- Whether any changes need to be made

In thinking about measuring results, it is easy to get carried away collecting data that in the long run is not very helpful. If your program is designed to reduce the number of people who smoke, it is more important to have a few basic facts about how many people who participated in the program stopped smoking than pages of data about how many people attended the classes and how many brochures were distributed.

Keep in mind that during the first six to twelve months of the program there may be a "placebo effect" which can be short-lived without continued results. For example, a physical fitness program may be very popular and result in reduced absenteeism for a few months; but unless the program succeeds in stimulating employees to change their health habits, the effect will be temporary and health will not necessarily improve.

# Measuring Results

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## **STEP 1:** Determine whether the program is having the desired results

This information is sometimes difficult to obtain, but it is very valuable. Look at the goals, objectives and strategies, and ask questions like these:

### Goals:

Are our goals being met? (e.g., are the company's health care costs being contained? Is the utilization of health services less, or different? Has productivity increased?)

### Objectives:

Are we meeting our objectives? (e.g., our short range objective was to reduce the number of employees who smoke by 10% in one year. After six months only 2% fewer employees are still smoking.)

### Strategies:

Are the selected strategies effective ways to meet the objective? (e.g., only one fourth of the employees who have stopped smoking participated in the smoking clinics; the others stopped smoking after their ex-foreman died of lung cancer.)

To obtain this information, the tools you used for the original needs assessment will be helpful. For example, Worksheet #2 can be modified for your company and used on a regular basis to monitor health related costs. Health risk appraisal forms can be completed annually or every two years by all employees or by those who are at high risk because of a stressful job, weight problems, excessive smoking or drinking, lack of exercise or poor nutritional habits. (If health risk appraisals are used, be aware that risk age may not change while behaviors may. You must look at answers to questions instead of aggregate risk ages.)

To evaluate the effectiveness of the program strategies, you will need to build in ways to keep track of changes in the health status of those who participate in the program activities.

# Measuring Results

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Step 1  
Example

Impact of Program  
on Goals and Objectives

Goals: After six months of the program the insurance company is reviewing our rates based on results of the health promotion program to date (see below). Absenteeism is down. Last year's annual average was 7.3 days absent/employee/year. Last quarter's average was 1.2 days/employee. Absenteeism is down for employees not participating in the health promotion program as well as those who are participating.

Objectives: We've been giving blood pressure checks to high-risk employees at three month intervals. More employees participating in one or more activities (exercise, smoking cessation, weight loss) showed a lower blood pressure than employees who are not participating.

Strategy: Based on the blood pressure checks, it appears that employees participating in the program are reducing their risk of cardiovascular disease. At the end of 12 months, we will administer the complete health risk appraisal to all employees and measure whether participants' overall health is improving compared to non-participants.



# Measuring Results

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## **STEP 2:** Find out if the activities are happening according to plan

This information is probably easier to obtain. Look at the activities and resources parts of your plan and ask questions like these:

### Activities:

How many employees and families are attending? Is attendance remaining high? Are activities happening on schedule? Are the times convenient?

### Resources:

Are the facilities adequate (right location, size, temperature, lighting, etc.)? Are employees learning from the instructors? Are employees learning from the educational materials? Are enough activities scheduled for the number of people who want to attend?

A simple tool for obtaining this information is a questionnaire distributed to employees who participate in the activities. Vendors who provide program services should be required to obtain such information, and provide a summary of the results.

To keep up with employees' changing interests and willingness to participate in health promotion activities, you can survey all employees at intervals, using your own version of Worksheet #3.

# Measuring Results

## Step 2 Example

### Assessment of Program Activities

<u>Participation</u>	<u>Actual</u> (1st Q)	<u>Planned</u> (Annual)
Blood pressure tests	185	194
Smoking clinic	15	75
Nutrition class	23	125
Weight loss clinic	18	75
Exercise program	135	200

#### Scheduling

Participation is higher for lunch hour and after work activities.

#### Facilities

After a few initial problems, transporting employees to the high school gym after work has been working smoothly, although many employees aren't able to participate because of family schedules.

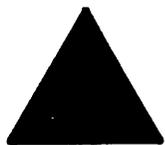
Company facilities are adequate although the lunch room is a little cramped for the aerobics class.

#### Instructors

Participant response to the quality of instruction has been very good. Specific comments from participants have been forwarded to each instructor.

#### Employee interest

When we repeated the employee interest survey, we found 25% more employees indicated an interest in participating in health promotion activities than at the start of the program.



# Measuring Results

## DECISION POINT

The information you collect about goals, objectives, strategies, activities and resources can be used by many people to make a variety of decisions about any part of the program.

At the simplest level such information is valuable feedback to the instructors who are leading classes, to help them refine their approach so they can be more effective.

The information can also be used by those responsible for the program to recommend a different strategy or changes in activities and resources--another facility or instructor, more or less classes, or better employee incentives.

At the highest level, the information can be used by the company to decide whether to continue the program, expand it or drop it altogether.

Use Worksheet #12 to identify the decisions that need to be made about your health promotion program. This exercise will help clarify the information required to measure the results of the program.

DECISION POINT	
Example	
Worksheet #12 Decisions to be Made	
<u>Decisions</u>	<u>When to Decide?</u>
1. <u>Do we need to adjust the mix of resources?</u>	
Change vendor of smoking clinic or weight loss clinic?	after 6 months
Find different space for aerobics class?	after 6 months
Schedule different kinds of exercise activities?	after 6 months
2. <u>Will it take more resources to do this effectively?</u>	
Increase company subsidy of classes?	after 12 months
Schedule more classes per week?	after 12 months
3. <u>Should we try another strategy or modify this one?</u>	
Develop another strategy aimed at people who don't want to attend classes.	after 12 months
4. <u>Should we drop the plan altogether?</u>	
Do cost savings and/or changed employee behavior justify program expenditures?	after 12 months

# Summary Checklist

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Health promotion programs work best when the overall company environment is supportive--when top management is visibly involved, when leadership is strong, when the emphasis is on health rather than illness, and when there is a positive, voluntary approach to participation. Other important ingredients for success are: employee participation in planning, a sound knowledge base, well-articulated goals, and good tracking of results.

One of the biggest pitfalls to watch for is an outburst of general enthusiasm in the beginning. It is hard to maintain this energy level and the program is likely to falter. Other common mistakes are to emphasize activities rather than results, and to adopt a paternalistic "we'll do it for you" approach rather than a "together we can each improve our health" approach.

On the next page is a checklist for reviewing the progress you have made in completing your health promotion program.

# Health Promotion Program

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## Planning Checklist

### Getting Organized

- Form a health promotion team
- Determine the team's mandate
- Identify the team's responsibility
- Determine company resources
- Identify "people" resources
- Identify who approves program

### Assessing Needs

- Determine direct and indirect health related costs
- Assess employees' health
- Survey employees' interests

### Designing the Program

- List health needs
- Analyze high priority problems
- Set long-range objectives
- Identify resources and obstacles
- List specific activities
- Develop a budget
- Consider financing options
- Motivate employees to participate

### Starting the Program

- Make a time-line
- Arrange for facilities
- Arrange for staffing
- Schedule activities
- Gather educational materials

### Measuring Results

- Determine results of program
- Assess activities

# Recommended Reading

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## Books and Pamphlets:

Health Promotion and Consumer Health Education, A Task Force Report  
Sponsored by the John E. Forgarty International Center for Advanced Study  
in the Health Services, the National Institute of Health, and the American  
College of Preventive Medicine, 1976, Prodist, a division of Neale Watson  
Academic Publication, Inc., 156 Fifth Avenue, New York, NY 10010.

Health Promotion in the Community: A Guide to Working with Employers,  
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tute, 528 - 18th Avenue, Seattle, WA 98122.

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Pinehurst Way Northeast, Seattle, WA 98125.

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Worksheet #1  
People Resources

Skills/Knowledge  
Needed

Team Members

Others

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Worksheet #2  
Estimating Total Company Health Care Expenditures

Health Insurance Premiums

Premiums*	1979	1980	1981	1982	1983 (Est)
Total company and employee expenditures on health insurance premiums					

Average cost/employee

% increase in total expenditures on health insurance premiums over previous year

\*NOTE: Some increased costs may be due to increased benefits and/or coverage. If your company offers different plans to various employee groups, you may need to account for these differences when completing this portion of the worksheet.

Increase: \_\_\_\_\_% in five years

Disability Payments

Worker's Compensation	Social Security Disability
1982 Total           \$ _____	1982 Total           \$ _____
Per Employee       \$ _____	Per Employee       \$ _____

Absenteeism

Total days of absenteeism in 1982 \_\_\_\_\_ x approximate percent due to illness or disability \_\_\_\_\_ x average employee cost per day \_\_\_\_\_ = \$ \_\_\_\_\_ total cost of absenteeism or disability.

Total Company Health Care Expenditures in 1982

Total health insurance premiums	\$ _____
Total disability	_____
Total cost of absenteeism	_____
Add cost of substitute employees	_____
Other miscellaneous costs	_____
<b>TOTAL HEALTH CARE EXPENDITURES</b>	<b>\$ _____</b>

adapted from: Practical Planning Guide for Employee Health Promotion Programs, Health Planning Council, Inc., Madison, Wisconsin.

Worksheet #3  
Employee Interest Survey

Our company is interested in sponsoring an employee health improvement program, with activities such as jogging or aerobic dance, weight control or stress management classes, clinics to help quit smoking, and blood pressure checks. Participation would be strictly voluntary.

A health promotion planning team representing various departments has developed this questionnaire to survey employee interest in such a program. The team will use the results to recommend a health promotion program to management.

Please answer the following questions. We want to be sure this information is kept confidential, so do not put your name on the questionnaire.

1. Check any of the following statements that describe your current health habits.

Eating

- I usually eat three nutritious meals a day  
 I often eat on the run, skipping lunch or breakfast  
 I eat a lot of snacks  
 I eat too many sweets  
 I like a lot of salt on my food

Weight

- I'm about the right weight  
 I'd like to lose weight  
 I'd like to gain weight

Exercise

- I regularly exercise at least three times a week  
 I exercise once in a while  
 I hardly ever get any real exercise

Sleep

- I usually get a good night's sleep  
 I average at least two nights per week of inadequate sleep  
 I often have trouble getting adequate sleep

2. Alcohol/drugs

Circle the statement that best describes your use of these substances:

Alcohol	Never	Seldom	Frequently	Overdo it
Tobacco	Never	Seldom	Frequently	Overdo it
Drugs (tran- quilizers, sleeping pills, mari- juana, etc.)	Never	Seldom	Frequently	Overdo it
Caffeine	Never	Seldom	Frequently	Overdo it

3. List any concerns you have about your own health or the health of someone in your family.

4. Check which of the following health promotion activities you would consider participating in. Check any that members of your family might participate in.

<u>Health Promotion Activity</u>	<u>Definitely</u>	<u>Participation</u>		<u>Family</u>
		<u>Possibly</u>	<u>No</u>	
Exercise				
Aerobic dance				
Jogging				
Weight control				
Nutrition				
Quit smoking				
Coping with stress				
Time management				
Cancer screening/education				
High blood pressure screening				
Hearing screening/referral				
First aid/CPR instruction				
Back pain				
Safety/accident prevention				
Alcohol/drug abuse education				
Retirement planning				
Heart attack risk reduction				
Parenting				

5. What other health promotion activities would you be interested in?

6. Which seasons of the year would you be most likely to participate?

- Spring
- Summer
- Fall
- Winter

7. What day(s) of the week would you be most likely to participate?

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday

8. What time of day would you prefer to attend health promotion activities?

- Early morning, before work
- Noon hour
- Late afternoon, after work
- Evenings
- Weekends
- Other \_\_\_\_\_

9. Where would you be most likely to participate in a company-sponsored health promotion activity?

- Company facility
- YMCA/YWCA
- School
- Private health club

10. Would you be willing to share the cost of participating in these programs?

- Yes
- No

11. What is the most you would be willing to contribute for an activity that involved two sessions a week for eight weeks?

- \$10
- \$20
- \$30
- \$40

12. List any concerns you have about health or safety related to the place where you work.

Thank you for taking the time to fill out this questionnaire. Please leave it in the box in the reception area. The health promotion planning team will keep you informed about the program as it is developed. Feel free to contact \_\_\_\_\_ for more information or if you are interested in helping plan or conduct programs.

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Worksheet #4  
Health Needs/Problems

1.

2.

3.

4.

5.

6.

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Worksheet #5  
Problem Analysis

Problem:

How many employees:

Employee characteristics:

Possible causes:

Others affected:

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Worksheet #6  
Long Range Objectives/Strategies

Problem:

Long Range Objective:

Strategy:

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Worksheet #7  
Resources Needed/Potential Obstacles

Strategy:

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<u>Resource</u>	<u>Estimated Cost</u> (and basis of cost)
<u>Personnel</u>	
<u>Facilities</u>	
<u>Equipment</u>	
<u>Materials</u>	

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Potential obstacles

Possible solutions

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Worksheet #8  
Short Range Objectives/Program Activities

Long Range Objective:

Short Range Objective:

Activities

Number of  
Participants

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Worksheet #9  
Budget

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Activity (and cost basis)	Annual Cost
Planning/administration	
Personnel	
Other	
Program #1	
Program #2	
Program #3	
Program #4	
TOTAL	

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Worksheet #10  
Health Promotion Plan

Overall Goal:

Long Range Objective:

Short Range Objective:

Strategy:

Activities/Budget:

Financing Plan:

Employee Involvement Plan:

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Worksheet #11

Schedule for Phasing In  
Health Promotion Program

Activity

Month

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1 2 3 4 5 6 7 8 9 10 11 12

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Worksheet #12  
Decisions to be Made

Decisions

When to Decide?

1. Do we need to adjust the mix of resources?
  2. What resource changes are needed to do this effectively?
  3. Should we try another strategy or modify this one?
  4. Should we drop the plan altogether?
-

## EDUCATIONAL MATERIALS

The following materials on employee health promotion have been included primarily for use in internal education sessions your company may want to conduct on employee health promotion. These materials contain basic information suitable for general orientation sessions on health promotion.

The materials are designed so that they can easily be made into overhead transparencies for use at group presentations. You may also want to copy selected pages and distribute them to your employees to enhance their understanding of health promotion.

## EMPLOYEE HEALTH PROMOTION

- CONSISTS OF ONGOING ORGANIZED ACTIVITIES DESIGNED TO:

INFORM

MOTIVATE

SUPPORT

INDIVIDUALS IN THE VOLUNTARY ADOPTION OF HEALTHY HABITS AND LIFESTYLES

- INVOLVES AN INTEGRATED APPROACH TO HEALTH AND INCLUDES:

HEALTH EDUCATION

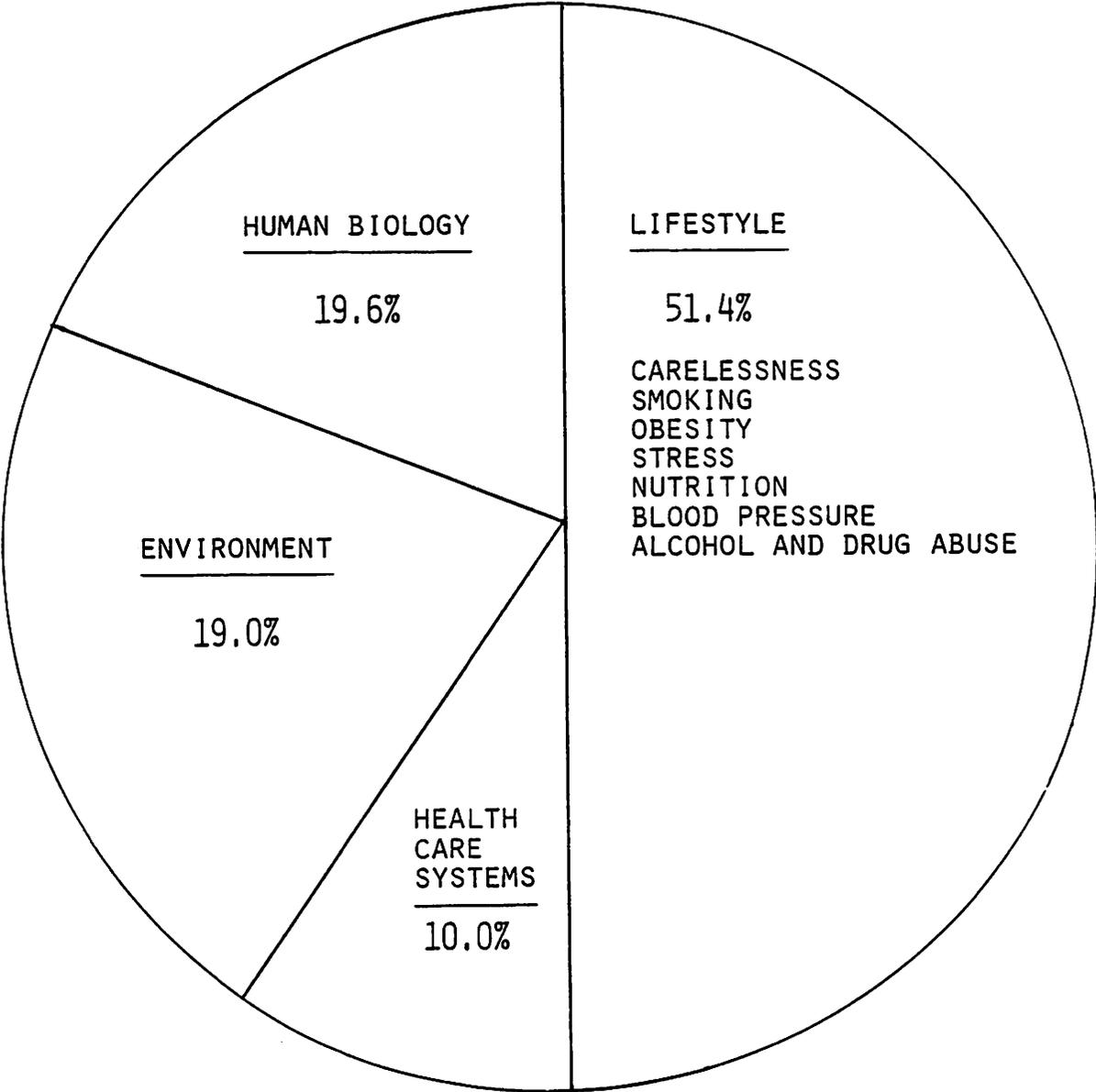
OCCUPATIONAL HEALTH AND SAFETY

ENVIRONMENTAL HEALTH

CORPORATE "HEALTH"

- CREATING A SUPPORTIVE ENVIRONMENT THAT FACILITATES THE MAINTENANCE OF HEALTHY BEHAVIORS IS CRITICAL
- EMPLOYEE PARTICIPATION AND COMMITMENT IS ESSENTIAL

CONTRIBUTING FACTORS TO MORTALITY



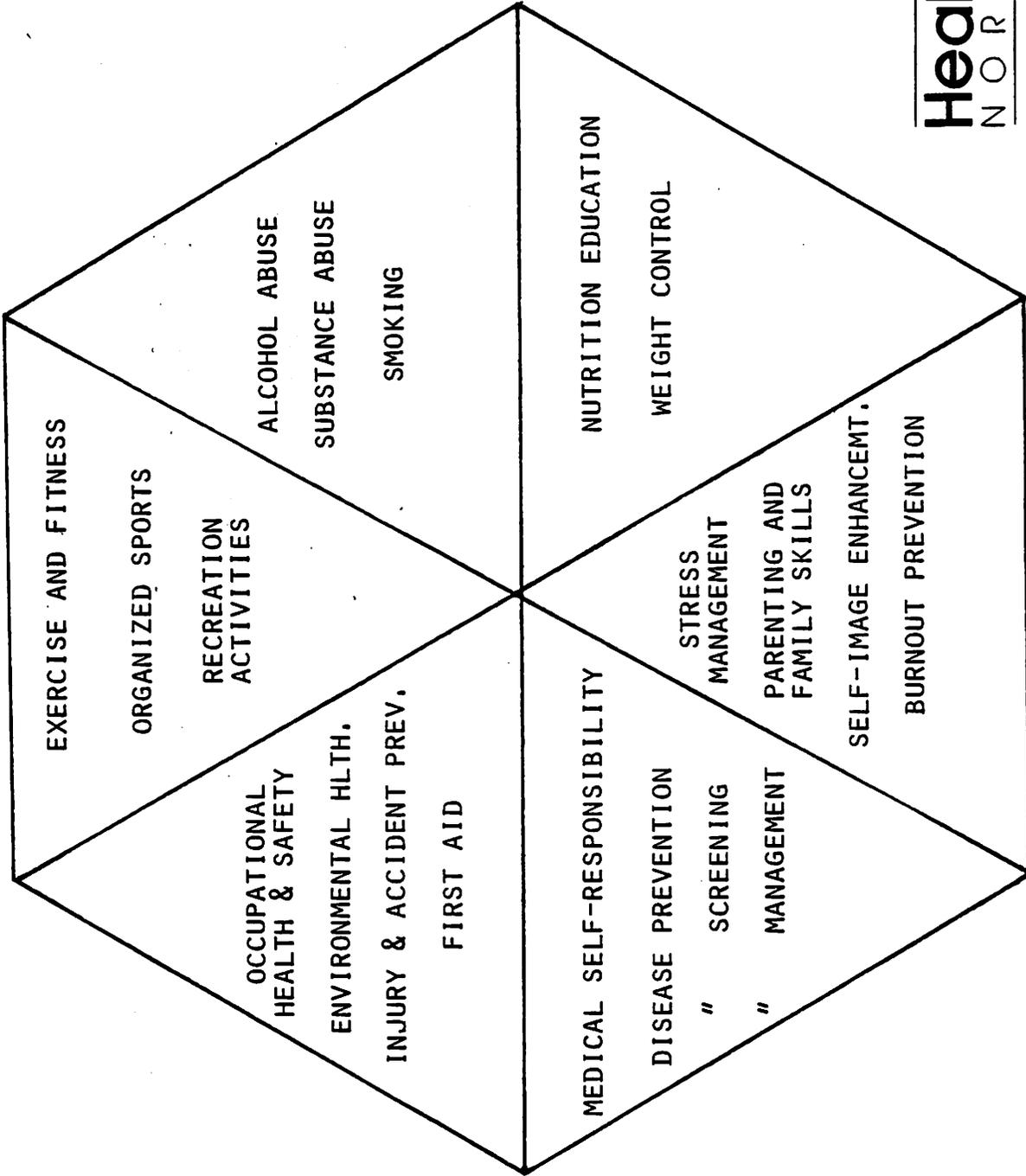
## WHY PROGRAMS SUCCEED

- "SUPPORTIVE ENVIRONMENT"
- VISIBLE, STRONG LEADERSHIP
- SOUND, SCIENTIFIC, CONSISTENT KNOWLEDGE BASE
- POSITIVE, NON-BLAMING, VOLUNTARY APPROACH
- WORKER PARTICIPATION IN PLANNING
- EMPHASIS ON HEALTH (AND PRIMARY PREVENTION)
- RECORDKEEPING AND TRACKING OF PROGRAM RESULTS
- WELL-ARTICULATED, SPECIFIC AND ATTAINABLE GOALS
- HIGH-LEVEL ENDORSEMENT AND INVOLVEMENT

HEALTH PROMOTION BENEFITS  
TO THE COMPANY

- REDUCE HEALTH CARE COSTS
- REDUCE ABSENTEEISM
- REDUCE TURNOVER OF EMPLOYEES
- INCREASE EMPLOYEE PRODUCTIVITY
- INCREASE EMPLOYEE FITNESS
- INCREASE EMPLOYEE COPING CAPABILITY
- DEMONSTRATE COMPANY INTEREST IN GREATEST ASSET--  
EMPLOYEE

**MAJOR AREAS OF EMPLOYEE HEALTH PROMOTION**



**COSTS TO EMPLOYERS**  
**(IN ANNUAL FIGURES)**

- PREMATURE DEATHS = \$25 BILLION  
132 MILLION WORKDAYS OF LOST PRODUCTION
  
- HEART DISEASE = 52 MILLION WORKDAYS LOST
  
- HEART ATTACKS = KILL MORE THAN 1 MILLION PEOPLE A YEAR  
\$700 MILLION PER YEAR TO RECRUIT REPLACEMENTS
  
- BACK PAINS = \$1 BILLION LOST OUTPUT  
\$250 MILLION WORKMAN'S COMP CLAIMS  
AFFECTS 75 MILLION WORKING MEN AND WOMEN
  
- CHRONIC FATIGUE = LESS EFFICIENCY  
LESS PRODUCTIVITY  
INCREASED PROBABILITY OF ACCIDENTS ON THE JOB

## COSTS OF POOR HEALTH

ABSENT EMPLOYEE:	1-1/2 TIMES AVERAGE DAILY WAGE
SMOKER:	ADDITIONAL ANNUAL COST OF \$600-\$4600 50% HIGHER ABSENTEEISM THAN NONSMOKER
OVERWEIGHT:	LOSES 1 MONTH OF LIFE FOR EACH POUND OVER 10 POUNDS MORE THAN IDEAL WEIGHT
PROBLEM DRINKER:	TWICE THE AVERAGE ABSENTEEISM MAJOR CAUSE OF ACCIDENTS/INJURIES
LOW BACK PAIN:	35-70% OF LOST WORK DAYS
HEART ATTACK:	AVERAGE COST OF \$21,551
TURNOVER:	AVERAGE COST PER EMPLOYEE OF \$4595
DISABILITY:	AVERAGE CLAIM OF \$5289
SEDENTARY EMPLOYEE:	30% HIGHER ABSENTEEISM
COLON-RECTAL CANCER:	ONE CASE COSTS COMPANY AVERAGE OF \$52,000 IN HOSPITAL/MEDICAL/SURGICAL EXPENSE, \$14,000 IN DEATH BENEFITS + COSTS OF REPLACEMENT

THE BOTTOM LINE

HEART DISEASE

+

LOW BACK PAIN

+

UNDERPRODUCTIVITY

+

PREMATURE RETIREMENT

+

LOW MORALE

+

EXCESSIVE SICK LEAVE

+

EARLY DISABILITY

+

PREMATURE DEATH

+

ACCIDENTS

EQUAL:

THE SPIRALING COST TO BUSINESS AND  
INDUSTRY FROM PREVENTABLE CONDITIONS

**HealthWorks**  
NORTHWEST

1-83

ADVANTAGES OF HEALTH PROMOTION  
AT THE WORKPLACE

- CONVENIENCE TO EMPLOYEES
- EMPLOYEES PRESUME QUALITY IF COMPANY-SPONSORED
- EMPLOYEES VIEW PROGRAMS AS PART OF PAY
- HIGHER DEGREE VOLUNTARY PARTICIPATION
- POTENTIAL ECONOMIC RETURN OF EMPLOYER'S HEALTH CARE COST
- OFFERS CHANCE FOR:
  - SOCIAL SUPPORT FOR BEHAVIOR CHANGE
  - ACQUISITION OF HEALTH-RELATED DATA
  - APPLICATION OF LONG-TERM INTERVENTIONS
  - COMMUNICATION ON MASS OR INDIVIDUAL BASIS