

# VHA Employee Wellness Program Start-Up Guide



National Center for Health Promotion  
and Disease Prevention  
And  
The Wellness Advisory Council

## Foreword

The Wellness Start-Up Guide provides a road map for implementing and sustaining an effective wellness program. The intent is that this tool will serve as a useful resource in the pursuit of a healthier state of well being for all employees.

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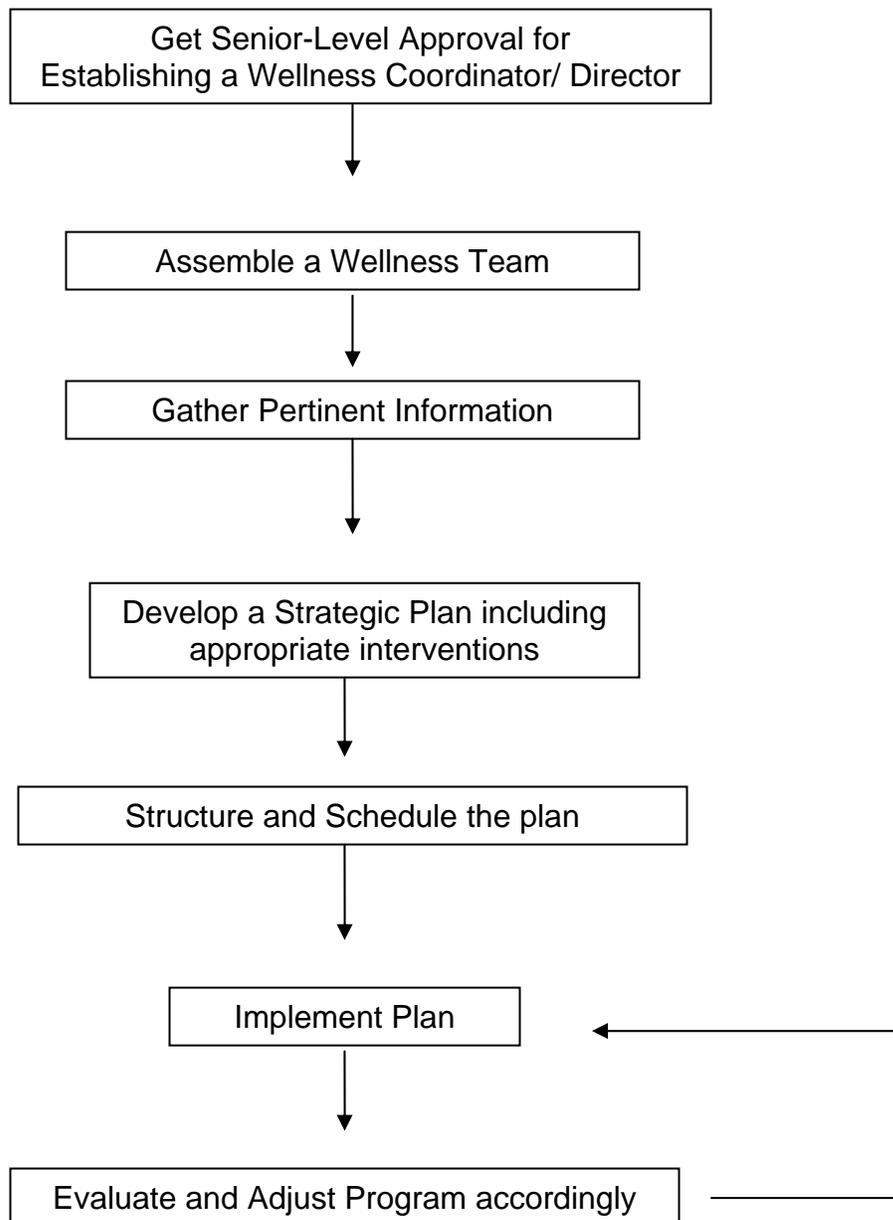
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## Getting Started

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### Steps to Starting a Program

It is important to begin a wellness program strategically rather than just relying on gut feeling or random feedback and observations from the worksite. A well-thought out program has the best chance of succeeding in making a measurable change in the employees' health habits and productivity. The following flowchart illustrates the basic steps for implementation of a wellness program.



The establishment of a wellness program has no end point, since the needs of employees and stakeholders are ever-evolving. With the advances in health-related research, it's important to continually revise and adjust wellness programs for maximum effectiveness.

### ***Getting Support***

The aim is to create a successful wellness program and one can assume that through hard work, passion and commitment, success will be achieved. But there is one key component that cannot be overlooked – that of leadership support. Without such support a program may be mediocre; with it the possibilities are endless.

In the earliest stages, it may be a leap of faith to expect support for an employee wellness program, so it is important to provide justification. Consider some of the following strategies in order to get support for initiating a program.

- **Paint a clear picture** - Be able to describe a vision for the wellness team, possible programming, and the business impact that's attainable for the organization.
- **Present the facts** - Gathering data specific to the employee population can be conducted in a later step but it may become necessary to present initial information in order to support the intent. Documented support of employee wellness is available in health and business journals.
- **Compare and contrast** - A market analysis to show management what similar organizations are offering, and their costs, can be beneficial.
- **Join forces** – Show how employee wellness fits with the overall mission of the facility, VISN, and VHA and how these efforts can tie together existing programs. This allows leadership to see how collaboration is effective in working towards a common goal.
- **Be clear with requests** – Making a case for the overall benefit of employee wellness includes a specific request to approve the initiation of a program. Clearly state what's needed to proceed and how progress will be reported. Help leadership to understand the need for resources but know that they may need actual data to better visualize a return on investment. Make use of external data to strengthen the case.

- **Be willing to negotiate** – After clearly expressing the request, concessions may have to be made. For instance, when requesting FTE for creating a Wellness Coordinator position, a part-time or temporary arrangement may initially need to be considered. Proposing a temporary position may further help in getting a “foot in the door”. However, be careful not to underestimate the time that it will take to build a program and see any measurable results.

Don't forget about the importance of meeting the needs of the target audience – fellow employees. Starting a wellness initiative at the grassroots level allows the building of frontline support as those involved concurrently solicit help from leadership.

### ***Establishing a Wellness Coordinator/Director***

The person (or persons) chosen to lead the program should be energetic, knowledgeable, and able to serve as a role model for healthy behavior. . He/she should also be a strong, respected leader. This step is critical and will help to ensure effective communication, support and success. Since wellness encompasses many areas of health, a variety of health professionals can adequately fulfill the role. This person will need to be able to work well with others, advocate for change, and be creative in program development and implementation. It is crucial to choose a person that is well-respected by fellow employees and one who can easily gain their trust. It is also important to build rapport and establish a wellness team that understands the culture of the organization. Each organization is different, and what might work for one facility may not for another. It may be helpful to seek advice from someone with experience in this area.

### ***Assembling a Wellness Team***

Selecting appropriate members to serve on a wellness team can be just as important as identifying the appropriate program director. Wellness team members should be as enthusiastic about promoting health as the coordinator, but may not need to be the expert in all or any area of wellness. Team members can be selected based on area of expertise or as representatives from various work areas

of the organization. It is wise to include occupational health, employee association, and union/other labor representatives on the planning team. Be careful about involving too many or too few members on the team, as this can create a barrier to building a strong team. Not all team members need to be the “perfect picture of health”. Having a variety of members allows for different perspectives, which can help in developing realistic interventions. However the team should be committed to dedicating time for building and implementing the program and be passionate about the efforts at hand. Don’t expect managers to designate their best employees for the committee as this could result in having people who don’t want to be there. Make each member responsible for some task or event, no matter how small.

### *Designing a Program that Works*

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Often people in the business of helping others are so enthusiastic about making a difference that it is difficult to channel the enthusiasm into program planning. However, this is the difference between a program that is “nice” or “fluff” and a program that truly makes an impact.

#### **Core Wellness Program Components**

Wellness is defined as the state of “enhanced health and well being” and wellness programs can come in all shapes and sizes. There are generally considered to be “Six Components to Wellness”.

**Physical** – Body, Endurance, Flexibility, Strength

**Social** – Family, Friends, Relationships

**Occupational** – Personal and Professional Development, Worthwhile Work

**Intellectual** – Mind, Creativity, Knowledge

**Spiritual** – Values, Purpose, Religion, Intuition

**Emotional** – Feelings, Self Esteem, Coping with Stress

Programming may include interventions from more than one component of wellness.

A wellness program is not just about having the occasional lunchtime program. Wellness is about valuing the whole employee in all six dimensions. Worksite wellness focuses more specifically on how these six dimensions affect productivity and creativity at work.

### ***Gathering Pertinent Information***

A map for a wellness program is most effective if one knows where to start and how to get there. To determine a beginning point, it's essential to gather as much information as possible. Knowing the demographics of employees, including not only gender, age, education, and race, but also what hours employees work, how far they live from work, and whether they care for children or elderly parents, can be helpful in determining the direction of a program. The Human Resources department is often able to generate this information. In addition, it is vital to gather some type of health data, such as weight, lipids, blood pressure, past diagnosis, etc. This can be gathered from the worksite health insurer in aggregate data form, but the confidentiality of individual employees must be protected. Occupational Health data (including injuries at the workplace) can also be collected. Such data should be de-identified, unless otherwise approved by individual employees. All information should be confidential and ethically respected. Don't forget about other sources of information, such as the national all-employee survey, a source where results may related to employee wellness.

### ***Needs Assessment***

Existing data can be collected through an employee needs assessment. An initial needs assessment is the best way to determine what the employees perceive as their greatest wellness need. A needs assessment should not be confused with a Health Risk Appraisal (HRA). While the two can be combined into a lengthier format, the needs assessment is intended to generate perceived needs from employees (*A sample needs assessment can be found in the Kit*). Basic health screenings can be conducted at the same time as the assessment to aid in gathering objective health data. Again, it is important to follow the proper rules of privacy. It can be

beneficial to partner with Occupational Health for cholesterol, diabetes, weight, blood pressure, stress, and body mass index (BMI) screenings. Once a starting point is determined, it is important to gather data to define program goals. A survey of middle and upper management regarding their expectations for the program will not only help to gain their support but will also ensure success of a wellness program.

### ***Develop a Strategic Plan***

After the data has been gathered, the next step is to formulate a plan for achieving the goals. A Strategic Plan should include the main objectives, the steps that will ensure achievement, and a way to measure success. A well-detailed plan is also helpful to determine the resources to be used, the people who will be responsible for overseeing certain components of the plan, and a target deadline that will keep everyone on course. The objectives should align with the wellness program's mission statement and that of the organization. Conversely, the organization's strategic plan should also contain a component to support employee wellness. A Strategic Plan should be updated often and revised at least once a year (See *sample Strategic Plan in the Kit*).

The ultimate goal is to integrate wellness into the very culture of the organization; a culture that places real value on a healthier lifestyle for employees and their families. Consider linking employee wellness to established programs such as *MOVE!* Be sure to keep people informed as this will help to avoid a duplication of efforts. A network-wide wellness approach can provide support for local facilities, serve as an advocate for resources and program implementation, and provide guidance on VA directives and regulations. A word of caution; a network wellness council should share the vision while at the same time support and encourage autonomy at the facility level.

### ***Acquiring Resources***

As the strategic plan is developed, one may encounter a gap between the ideal program and what is affordable. Fortunately, there are numerous free resources available. A listing of the most common resource roadblocks and possible solutions to overcoming them is provided below.

Lack of Time and/or Manpower	Team up with local health agencies, non-profit organizations, local business, and government organizations that have education coordinators or representatives willing to come to the workplace and educate employees at no charge. Consider volunteers, students, or interns to help in managing the program or in coordinating individual events.
Lack of Money	Donations from area businesses can be used for drawings or used as program incentives. Work with the Employee Association to see if area businesses are willing to donate items or services. Charge a fee for attendance at a program or exercise class. Ask for pharmaceutical companies or other health-related businesses to sponsor events or speakers, within the guidelines of the facility. Consider applying for grants, given the time and skill to go through the process. Look for free educational materials on websites, or ask companies to send samples of their products for give-a-ways or incentives. Ask if local fitness centers offer discounts for employees. Collaborate with county, city, and state programs and Public Health Departments that may share the same goals.
Lack of Space	Consider having programs outside or go to individual work areas to educate employees. Creatively think of alternatives to the usual format or room set-up for programs. Consider alternate timing for programs. Look into using local libraries, or other government and private spaces near the worksite. There are also community centers and churches that offer health promotion programs and have space for education.
Overall Need	Consider contracting out the wellness program, if encountering difficulty managing an overall program. If this is not an option, provide a list of community or online resources. Local libraries have computer classes, educational centers and grocery stores may have cooking classes, even Parks and Recreation Departments have lists of biking trails, etc. Sometimes, just getting employees together for mentoring or support groups can be a valuable resource.

### ***Determine Measures of Success Now***

Another crucial component of the Strategic Plan is “begin with the end in mind”. Before implementing any of the strategies listed, consider what would be an appropriate gauge of success. Initially, the goal may be to achieve increased awareness of a program, (i.e., successful attendance and participation in the program’s events). Waiting until a program is over to determine the success is no longer an objective measurement and the opportunity to gather the information while there is a captive audience may be lost. Planning measures before an event also allows time to determine the measurement tool. Consider using employee surveys to determine how employees perceive the program’s impact on their health and their work. Consider asking how often the employee participates in wellness activities or how they will apply the information learned towards changing future health behaviors. Taking measurements of health indicators such as blood pressure can provide an idea of the aggregate health issues. It will be difficult to make a specific conclusion on the effect of programming unless the employee behavior is measured after an intervention. This information applies more to understanding the employee population versus the impact of programming (see *Gathering Pertinent Information*). Be sure to communicate the success of the measures after an event to fellow employees and management.

### ***Structure and Schedule the Wellness Plan***

Even the most well written strategic plan means nothing until it is put into practice. Formulating the strategies identified on the plan into a schedule assures that the objectives will be reached. Use the plan and strategic calendar to determine a completion date for the strategies. This is the time to be realistic. Honestly consider the time it will take to prepare for each event. Remember that great change does not happen overnight. Consider appropriate times of the year to address pertinent topics at the worksite. The 2006 Health Observances can be used as a guide in planning (see *Additional Resources List for website*). Also consider the resources, including manpower that will be available to help implement each strategy at the ideal time of year. Determine what the target audience will experience at a specific time of the year (e.g., conduct a program in April on reducing the stress about saving money).

## *Successful Implementation*

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It's now time to move forward. Although anxious to jump to this point from the start, the foundation has been laid and the hard work will result in a more successful program. The key now is to get participation and buy-in from all levels in the organization.

### **Getting Management Involved** (front office and mid-levels)

Once the plan has been created it's important to communicate this plan to management. Leaders know that satisfied employees are crucial to the success of an organization and they understand the importance of a healthy workforce. But they also need to know what role they should play and how they can become a fundamental aspect of a wellness program. Consider developing a wellness portfolio to keep track of activities, goals, objectives, measures, and evaluation (Ex. ROI – return on investment). Discuss how managers can support employees' participation because the program is designed to meet the needs of the overall organization.

### **Marketing 101**

Marketing is about getting the target market's attention and then encouraging those individuals toward a certain behavior or action. In the case of marketing an event, one must know how to entice employees to participate in an event. A critical concept of marketing is to approach it from the perspective of the target audience. Consider the "4P's" of marketing theory:

**Product** – This doesn't need to be a tangible item, but rather can be a service or behavior (i.e. pedometer, walking program, or increased activity). Is the product usable and desirable to the audience? For instance, when targeting employees who are inactive, a marathon may not be a product that would be of interest to them.

**Place** – Where to hold interventions takes some thought. Make sure that the lighting and sound quality is appropriate for the event. Is the space large enough and the layout conducive to good traffic flow? For outdoor

activities, is there a shaded or covered area in case of hot or rainy weather? Is the location convenient to the target market's work area? While it might seem that hosting events is limited to the main conference room, consider alternatives – such as educating employees in the elevator, in the lunch line, or take the educational series to their work area by using an “*education-on-a-roll*” approach.

**Price** – If not selling a product or service, there is always a cost for participating. For employees to come to a health fair, it may cost time away from their job, may entail walking a long distance to attend, or may involve coming in to work during non-work hours to participate. It is important to consider the cost to the target market so that the event's value outweighs any price paid.

**Promotion** – The most fascinating program means little without participants. It is important not to short change this aspect of preparation. Determine what methods of promotion work best at the worksite – e-mail notices, posters, flyers, newsletter articles, paycheck stuffers, overhead announcements, etc. It may be beneficial to vary the methods of promotion to keep the program fresh and interesting. Even changing from a flat poster to a three-dimensional sign is sure to grab more attention! Face to face interaction works best and don't forget that employees are the most effective salespeople.

This information can also apply to marketing a program's identity by developing a slogan, logo, mission, and vision statement.

### ***Incentives***

In marketing a wellness event, consider the price to the target market. The use of incentives can be a clever way to make the benefit of participating in an event or program greater than the cost. Incentives can include the obvious - cash, refreshments, and give-a-ways (i.e. t-shirts, pens, etc.), however incentives can also include discounts, drawing entries, recognition, time off, or educational/training time. It is surprising that the most miniscule of incentives can increase participation dramatically. Be careful not to fall into the trap of *having* to offer an incentive to get people to participate. Incentives should compliment the

event or message and should be reserved for those times when participation is most crucial.

### ***Have Fun and Give Thanks***

On the day of the event it is important for the committee members to enjoy the program and take time to observe how the attendees react to the intervention. Are people confused by the layout? Are there certain booths that are more attractive than others? Are there portions of the lunch and learn that spark more input than others? Although there should be some kind of tool in place to measure the success of the event, simple observations can be very helpful in improving future events.

After everything is said and done, it is crucial to thank those who helped with the event. A Wellness Coordinator is only as good as those who help to make the events happen. Don't forget to thank outside vendors, exhibitors, and donors, too. It is also wise to thank the participants, possibly in a public forum, for their efforts and successes. Recognize leaders publicly for their support. Hold them up as a role model and consider nominating them for wellness awards.

## *Evaluation*

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Evaluation is one of the most critical points in the development of a program. If the strategic plan was built correctly, measures to gauge success are included in the implementation plan. An analysis of the results will determine what course corrections are needed. Do not worry if the goal has not yet been achieved. Evaluation is not a time for ego, but rather self-confidence as this is just one step in the journey. It is important not to ignore the information, but rather to use it in making an increasingly strong program.

### **Analyze Success Measures**

If the previously determined measure of success was merely to have a large attendance (“large” should be determined by a specific number or percentage ahead of time), then this stage involves simply tallying the sign-in sheet. However, when looking at the success of a wellness program as a whole, more extensive calculations may be needed such as the effect on employee absenteeism, employee productivity, and the overall return on investment (ROI). Crunching numbers need not be a nightmare of flashbacks to high school algebra class. Following these simple guidelines can help to quantify success and communicate the program’s effectiveness concisely.

Consider measuring the following:

- *Worker’s compensation claims* – number and dollar value
- *Absenteeism* - Tally sick leave used, but consider factoring out family leave. Also add in the cost of any “pool” staff used to cover shortages.
- *Presenteeism* – This term refers to the cost of employees who are at work but not functioning at their full capacity. This can be measured by a simple self-assessment question such as “On average, how many days each month are you limited at work due to back pain, headaches, head colds, or other illnesses?” Ask a question such as “On average, how many days each month are you limited at work due to family issues, financial concerns, or other work/life balance issues?” to determine the impact of employees’ work/life balance on

presenteeism. Quantify further by asking “On those days, at what percent of your normal ability are you able to function? – 10% - 30%- 50%- 70% - 90%”.

- *Number of injuries and light duty time*
- *Health insurance expenditures*
- *Health indicators* - such as weight/BMI, blood pressure, lipids, fasting blood sugar levels, tobacco usage, reported health behaviors, diagnosis or family histories of heart disease, hypertension, diabetes, and cancers. (These can be obtained voluntarily through screenings and the use of Health Risk Appraisals.)

$$\text{Benefit/Cost Ratio} = \frac{\text{Program Benefits}}{\text{Program Costs}}$$

$$\text{Return on Investment (ROI)} = \frac{\text{Net Program Benefits}}{\text{Program Costs}} \times 100$$

**Example:**

A program to encourage smoking cessation by giving nicotine replacement patches to participants.

Program cost is \$189 per participant (56 patches) x 25 participants = \$4,725\*.

Eight participants quit smoking (approximately 30% success rate).

Benefit – the company saves a cost of \$960 per smoking employee per year\* x 8 participants = \$7,680. (Benefit for the first year only.)

$$\text{Benefit/Cost Ratio} = \frac{\text{Program Benefits}}{\text{Program Costs}} = \frac{\$7,680}{\$4,725} = 1.63$$

$$\text{ROI} = \frac{\text{Net Program Benefits}}{\text{Program Costs}} \times 100 = \frac{(\$7,680 - \$4,725)}{\$4,725} \times 100 = 62.5\%$$

*\*Cost derived from the DuPont Employee Study*

Again, be sure to communicate results to leadership and employees and include future recommendations in communication with leadership.

### ***Reviving a Tired Program***

If wellness events seem to be drawing fewer and fewer participants or the interventions don't seem to be effecting a change in employees, it is time to step back and re-evaluate the plan. Fixing the problem may be as simple as coming up with creative new approaches to address the same health topics. To do this, look to other programs, attend conferences, or get a new perspective. Students and interns are a wonderful way to get fresh and innovative approaches to traditional interventions. Never underestimate the importance of talking to the target market – the targeted employee population. Ask what would interest them, what methods of education they most prefer and what incentives might motivate them for change. Sometimes even taking a break for a month or two might be just the trick to re-energize participation - that old adage; “we don't know what we've got until it's gone”. Another way to revive a program is by changing the packaging; food manufacturers use this tactic all the time. Try a new logo, a new name, a new direction of planning and programming. Try offering programs outdoors or at different times. Consider offering programs through a different method, rather than the classic “lunch and learn”. Try to determine the reason for the lack of interest or poor participation in order to better direct efforts to the needs of the employees. Even the slightest change can cause employees to look at the program in a whole new light.

### ***Expanding into the Arena of Work/Life Balance***

It may seem challenging to create a wellness program that is comprehensive and effective. It's recommended that a wellness committee master the building of a wellness program before moving on to a more inclusive program. To fully address the health and wellness of the employee population demands consideration of the work/life balance issues. The term “work/life”, refers to all of the factors that affect

our health both in and outside of work hours. Employees do not just bring their “work selves” to the job. Rather, they bring all of the roles, concerns, and commitments with them. Work/life balance does not indicate the expectation that every employee will be able to have equal time and energy for work and life outside of work. The intent of a wellness program is to provide the support to handle the demands of all facets of our daily lives.

The topic of child care is often the primary focus of Work/Life Balance programs. However, it is important to again analyze the employee population needs. In working with a predominately middle aged employee population, there may be a greater need for elder care considerations. In assessing the employees’ needs, it is important to consider what factors affect productivity. If taking time away for preventative exams is an issue, mobile mammography, an onsite health clinic, or even routine blood pressure screenings may be helpful. On the other hand, if employees express a general sense of stress due to overwhelming number of errands and other daily tasks, then arranging onsite dry cleaning services, oil changes, even packaged dinners to go may be worthwhile interventions.

Employee Assistance Programs are another important component of work/life balance offered by many companies. It is critical to remember that work/life balance can be addressed in programs with limited resources. The ability to refer employees to local resources and notify them of programs available in the community can be a wonderful way of addressing these issues without having to have an extensive staff or expansive property.

## **Conclusion**

Likely the most important piece of advice to remember amidst all of the calculations, strategic plans, and operational objectives included in the kit is that *Worksite Wellness* means working with people. While one may need to convey quantifiable behavior change and return on investment figures to decision makers, employees are the first priority. One must truly care about the employee’s health and family in order to make long-lasting change. Mutual trust and honesty about personal struggles is key to the success of a program and employees will often respond better to a genuine spirit, than a “number-cruncher” whose focus is to get

more productivity out of the workforce. Be clear on the goals, steadfast with the plan, but true to the mission to achieve wellness.

## **Wellness Materials**

As part of this toolkit a selection of wellness materials and resources are available for use in VHA employee wellness programs, and are posted on the NCP website [www.prevention.va.gov](http://www.prevention.va.gov). As they become available, new materials will be added to the website. For materials specific to VA, please check the NCP intranet.