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Introduction

Employees spend approximately 36% of their total waking hours at work. This makes the worksite an ideal place to provide workers with the knowledge and skills needed to help improve attitudes and behaviors concerning health. Improving employee health can:

- Improve physical fitness and mental alertness
- Boost employee morale
- Possibly reduce absenteeism

The Worksite Wellness Index is a self-assessment and planning guide adapted from the Center for Disease Control and Prevention (CDC) *School Health Index: A Self Assessment and Planning Guide* (2004).

It will help you:

- Identify the strengths and weaknesses of your worksite's wellness and health promotion policies and programs
- Develop an action plan to implement a worksite wellness program or improve an existing program

Healthy eating and regular physical activity help people to stay in shape, feel good, and avoid developing risk factors that can lead to heart disease, stroke, cancer, and diabetes. Unfortunately, many people do not meet the physical activity and nutrition recommendations, and more and more Americans are becoming overweight than ever before.

Cardiovascular disease, stroke, cancer, and diabetes are all linked by common risk factors, behaviors and/or health habits associated with physical inactivity and poor nutrition. According to the CDC's 2004 report on *Physical Activity and Good Nutrition: Essential Elements to Prevent Chronic Diseases and Obesity*; poor eating habits and physical inactivity together account for at least 400,000 deaths among U.S. adults. Only tobacco use causes more preventable deaths in the United States. People who avoid behaviors that increase their risk for chronic diseases can expect to live healthier and longer lives.

Note: If at any time assistance is needed while your organization completes the Worksite Wellness Index you may contact the Texas Department of State Health Services, Cardiovascular Health and Wellness program at (512) 458-7670. Find other useful tools for developing worksite wellness programs at www.dshs.state.tx.us/wellness

Texas Behavioral Risk Factor Surveillance System (BRFSS) Facts

Nutrition and Overweight

- 36% of persons between the ages of 18 and 39 reported high fat intake (1993)
- 21% of persons between the ages of 18 and 44 reported eating the recommended five servings of fruits and vegetables each day (2003)
- 57% of adult Texans classified themselves as overweight or obese (2003) (based on Body Mass Index, BMI > 25)
- 57% of persons between the ages of 18 and 44 were recognized as at risk for health problems related to being overweight (2002) (based on Body Mass Index).

Highlights of the 1998 Texas Physical Activity Survey

- More than two-thirds (69%) of adult Texans are not getting the amount of physical activity recommended for greater health benefits (twenty minutes of moderate to vigorous activity three times a week).
- 41% of adult Texans reported the main personal reason they are not more physically active is that they believe they are already getting enough physical activity.
- However, 51% of adult Texans who believe they are already getting enough physical activity are not getting the amount of physical activity recommended for greater health benefits.
- 29% of adult Texans reported the main reason they are not more physically active is the lack of time for physical activity.
- 32% of adult Texans reported the leading community reason for not being more physically active is the lack of enough fitness facilities, sidewalks, and bicycle lanes.

Respondents reported the following barriers for not being physically active at the worksite:

- 71% of the respondents reported their worksites do not allow actual work time to be used for physical activity.
- 69% of the respondents reported their worksites do not have a written flex-time policy on physical activity.
- 82% of the respondents reported their worksites do not offer regular physical activity programs.
- 77% of the respondents reported their worksites do not have facilities or equipment for physical activity.
- 50% of the respondents reported their worksites do not have a safe place to walk.

Find more information regarding the Texas Behavioral Risk Factor Surveillance Survey from the Texas Department of State Health Services www.dshs.state.tx.us/chronicd

Instructions for Coordinator

1. **Review the Worksite Wellness Index assessment tool.**
2. **Assemble a Worksite Wellness Index team.** The first step toward employee wellness is to identify a team of people who will be responsible for completing the Worksite Wellness Index. You may choose an existing team, such as the Employee Wellness Committee or similar group, or create a new team. Broad participation is important for meaningful assessment and successful planning and implementation.
Suggested participants include:
 - human resources/benefits coordinator
 - employees from varying departments
 - administrators
 - supervisors
 - employee wellness staff
3. **Meet to discuss the Index.** At the first meeting, explain the Worksite Wellness Index. Set a timeline for the completion of the assessment. Working as a team will increase the accuracy of responses and tap into creative insights. Make sure that everyone gets a copy of the Instructions, Score Card, and Questionnaire.
4. **Complete the Index.** Each team member should answer the questions by getting any needed information and having open discussion. Each question gives directions on how to select from the four scoring choices. Answers should be written on a copy of the Score Card.
5. **Meet as a team.** Discuss each question and its scoring descriptions. Arrive at a consensus on a score for each question, and record the consensus score on a separate Score Card. The team should then use these results to answer the Planning Questions for each section.
6. **Arrive at recommendations.** As a team, arrive at recommendations for action to address any weaknesses identified by the scores earned for each question. List the team's recommendations in the Recommendation Table and rate each on the five criteria listed in the table.
7. **Prioritize.** Write the sum of the ratings in the "total" column in the Recommendation Table. In the "Priority Ranking" column of the Recommendation Table, indicate the rank order the team has decided for implementing the recommendations. Consider the "Total" column when ranking the recommendations, but do not feel bound to numerical totals. Some very important actions may be too expensive, labor intensive, or too complex to rank as number one. Others may be less important, but require fewer resources or staff to implement. Use the collaborative judgment and knowledge of your team members. Together they know the worksite and will arrive at the best mix of

important, achievable recommendations.

8. **Make a plan.** Once you have prioritized the recommendations, use the Action Plan Worksheet to further develop the team's ideas.
9. **Implement the plan.** Present the recommendations and action plan to the worksite's decision-making authority. After approval, implement the plan and monitor progress.

Tips for Completing the Worksite Wellness Index

- **Accuracy counts.** Please answer all questions as accurately as possible. The Worksite Wellness Index is your self-assessment and planning tool.
- **The focus is on health promotion.** The Worksite Wellness Index was designed to assess implementation of wellness and health promotion activities. It does not address basic administration duties such as bookkeeping.
- **There is no passing grade.** The Worksite Wellness Index is not intended to be used to compare one worksite wellness program with another. You should only use your Index scores to help you understand your worksite's strengths and weaknesses and to develop an action plan for improving your wellness and health promotion efforts. It is realistic to expect low scores in certain areas; low scores can help you build awareness of areas needing improvement.
- **Some actions are easier than others.** Use of the Worksite Wellness Index tool might lead your team to recommend actions that require additional resources. However, you might find that many of the recommended actions simply involve more efficient use of existing resources.
- **Keep the team together.** The purpose of completing the Worksite Wellness Index is to start a path or improve your worksite's wellness program. Once you have started, you can keep the team together and use the Index to monitor your progress. Establish a schedule for annual assessments, so that the Index can serve as tool for continuous improvement and accountability over time.

Part A: Worksite Policies and Environment

Questionnaire

A-1. Worksite Wellness Program Policy

Does the worksite have a current policy outlining the requirements and functions of a comprehensive worksite wellness program?

“A comprehensive” worksite wellness program promotes healthy lifestyle choices through defined policies about the worksite environment and health promotion programs/activities that are conducive to healthy behaviors.

3 = Yes

2 = There is a policy, but it needs modification to meet the needs of the worksite

1 = There is no policy, but there are plans to form one

0 = No

A-2. Representative Committee Oversees Worksite Wellness Programs

Does the worksite have a representative committee that meets at least once a month to oversee worksite wellness programs, including physical activity and nutrition programs?

“Representative” means that it includes relevant members of the workforce, such as staff, supervisors, administration, human resources/benefits coordinator, etc.

3 = Yes

2 = There is a committee, but it is not representative or it meets less than once a month

1 = There is no committee, but there are plans to form one

0 = No

A-3. Worksite Wellness Plan

Does the worksite have a worksite wellness plan in place that addresses the purpose, nature, duration, resources required, participants in, and expected results of a worksite wellness program?

3 = Yes

2 = There is a plan, but it needs modification to meet the needs of the worksite

1 = There is no plan, but there are plans to develop one

0 = No

A-4. Written Policies on Physical Activity

Does the worksite have written policies on physical activity that commit to the following?

- Supporting physical activity during duty time (flex-time)
- Providing incentives for engaging in physical activity
- Offering company sponsored fitness oriented programs for employees other than an exercise facility
- Providing a broad range of competitive and non-competitive physical activities that help develop the skills needed to participate in lifetime physical activities
- Providing exercise/physical fitness messages and information to employees
- Providing prompts to promote physical activity near each stairwell or elevator

“Lifetime physical activities” are those readily carried to settings other than the worksite. Examples include swimming, walking, running, racquet sports, and dancing.

3 = Yes for five or six areas listed above

2 = For three or four areas

1 = For one or two areas

0 = No

A-5. Breaks

Are employees provided with breaks during working hours and are employees encouraged to be active during break time?

Examples of a break time activity could be structured or unstructured such as walking in groups, performing stretching exercises at your desk, etc.

3 = Yes

2 = Breaks are provided each day, but employees are not given encouragement to be active

1 = Breaks are provided each day, but employees are restricted to the restroom, break room, or immediate work area

0 = Breaks are not provided any work day

A-6. Physical Activity Facilities

Does the worksite provide a facility/designated space or related support system on-site for physical activity by employees?

- On-site exercise facility
- Outdoor exercise areas, playing fields, or walking trails for employee use
- Free, discounted, or employer subsidized memberships to fitness centers
- On-site physical activity classes such as aerobics, kick-boxing, dancing, etc.
- Provide showers and/or changing facilities

3 = Yes

2 = For three or four areas

1 = For one or two areas

0 = No

A-7. Employee Access to Physical Activity Facilities Outside of Work Hours

Can all employees use the worksite's indoor/outdoor physical activity facilities outside of work hours?

"Outside of work hours" means before or after work, lunch, evenings, weekends, and on holidays.

3 = Yes, the worksite has identified indoor/outdoor areas that employees can access to engage in physical activity before, during or after work hours

2 = Indoor or outdoor facilities are available, but not both

1 = Indoor or outdoor facilities are available, but the hours of availability are very limited

0 = No indoor or outdoor facilities are available

A-8. Written Policies on Nutrition

Does the worksite have written policies on nutrition that commit to the following?

- *On-site cafeterias following healthy food preparation guidelines and practices (e.g. steaming, low-fat, low calorie, salt substitutes, limited frying, etc.)*
- *Healthy food options for any meetings, conferences, or training offered by the worksite*
- *Vending machines and/or onsite cafeteria offer nutritious food options as 25% of the total choices*
- *Healthy eating messages to the employee population (delivered via e-mail messages, payroll stuffers, bulletin boards, etc.)*
- *Supporting participation in nutrition-related activities during duty time (flex-time)*
- *Providing prompts to promote and identify healthy food/snack/drink choices near vending machine(s) or on-site cafeteria*

3 = Yes, for five or six areas listed above

2 = For three or four areas

1 = For one or two areas

0 = No

A-9. Written Policies on Tobacco Use

Does the worksite have written policies on tobacco use that commit to the following?

- *Prohibiting tobacco use anywhere on property*
- *Supporting participation in smoking cessation activities during duty time (flex-time)*
- *Providing prompts to support no tobacco use policy*

3 = Yes

2 = Yes, but tobacco use allowed in designated area(s)

1 = Yes, but flextime is not allowed to attend cessation classes or policy prompts not provided

0 = No

A-10. Staff Oriented to Policies

Is staff oriented to, and given copies of, the physical activity, nutrition, and tobacco use policies?

3 = Yes

2 = Oriented to or given copies, but not both

1 = No, but there are plans to

0 = No

A-11. Plan to Respond to Cardiac Events

Does the worksite have a written plan for emergency response to cardiac events at their facility?

3 = Yes

2 = Plan is in place, but does not meet the needs of the worksite

1 = No, but there are plans to develop an emergency response plan

0 = No

A-12. Emergency Response Training

Does the worksite provide emergency training for response to cardiac events at their facility?

- *Worksite has provided basic Cardiopulmonary Resuscitation (CPR) training and certification to employees within the current year*
- *Worksite has a policy on training employees on use and placement of Automated External Defibrillators (AED's)*

3 = Yes

2 = CPR training or AED training/placement, but not both

1 = No, but there are plans to do so in the future

0 = No

Part B: Health Promotion for Employees

Questionnaire

B-1. Healthcare Coverage for Employees

Does the worksite offer or provide adequate healthcare coverage for employees and their families for prevention of and rehabilitation of heart disease and stroke?

3 = Yes

2 = Offers or provides access to adequate health healthcare coverage, but coverage for prevention of and rehabilitation of heart disease and stroke is limited

1 = No, but there are plans to do so

0 = No

B-2. Health Screening for Employee

Does the worksite offer or provide easy access to free or reasonably priced health screenings for employees at a minimum of one time a year?

“Provide access to” means that the worksite has a special arrangement for employees to receive either on- or off-site health screening.

Examples of items that are part of a “health screening” include:

- height and weight measurements
- blood pressure checks
- cholesterol screening
- diabetes/blood sugar screening
- individual health risk appraisal

3 = Yes

2 = Offers or provides access to health screening, but is not reasonably priced or not easily accessible

1 = No, but there are plans to do so

0 = No

B-3. Physical Activity/Fitness Programs for Employees

Does the worksite offer or provide easy access to free or reasonably priced physical activity/fitness programs for the employees?

“Provide access to “ means the worksite has a special arrangement for employees to take classes on-site or at an off-site facility.

Examples of such “programs” include:

- Classes
- Workshops
- Facilities
- Special Events

3 = Yes

2 = Offers or provides access to physical activity/fitness programs, but they are not reasonably priced or not easily accessible

1 = No, but there are plans to do so

0 = No

B-4. Nutrition Education/Weight Management Programs for Employees

Does the worksite offer or provide easy access to free or reasonably priced nutrition education/weight management programs for the employees?

3 = Yes

2 = Offers or provides access to nutrition education/weight management programs, but they are not reasonably priced or not easily accessible

1 = No, but there are plans to do so

0 = No

B-5. Promote and Encourage Employee Participation

Does the worksite promote and encourage employee participation in its physical activity/fitness and nutrition education/weight management programs?

Examples of ways to “promote and encourage employee participation” include:

- Information at new employee orientation
- Information on programs provided with paychecks
- Flyers on wall or bulletin boards
- Letters mailed directly to employees
- Announcements at employee meetings
- Employee newsletter articles
- Incentive/reward programs
- Public recognition
- Health insurance discounts
- Provide showers and changing facilities
- Sponsor employee sports teams

3 = Yes, through four or more ways listed above

2 = Through one to three of the ways

1 = No, but there are plans to do so

0 = No

B-6. Awareness and Education Messages

Does the worksite provide awareness and education messages/information on the following?

- Heart disease and stroke prevention including risk factors such as high blood pressure, cholesterol, diabetes, overweight, etc.
- Signs and symptoms of heart attack, stroke, need to call 9-1-1
- Use of AEDs and CPR
- Good nutrition/eating habits
- Physical activity
- Tobacco prevention/control

3 = Yes, for five or six of the above items

2 = For three or four

1 = For one or two

0 = No

B-7. Budget for Employee Health Program

Is there a worksite budget for employee health promotion that includes a salary for a coordinator?

“Coordinator” means a full or part-time employee who is responsible for planning, designing, implementing, and evaluating employee health promotion activities.

3 = Yes

2 = There is a budget, but it does not include a salary for a full or part-time coordinator
(although the worksite may have a volunteer coordinator)

1 = No, but there are plans to create a budget

0 = No

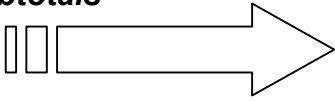
Appendix I – Tables and Worksheets

Part A: Worksite Policies and Environment

Part A: Worksite Policies and Environment

Score Card

Instructions: To complete this Score Card, first carefully read and discuss the Questionnaire. Answer the specific questions and follow the scoring descriptions. After all questions have been scored, respond to the Planning Questions for each question.

| | Fully In Place | Partially In Place | Under Development | No |
|--|--|--------------------|-------------------|-----|
| A-1. Worksite Wellness Program Policy | 3 | 2 | 1 | 0 |
| A-2. Representative Committee oversees Worksite Wellness Programs | 3 | 2 | 1 | 0 |
| A-3. Worksite Wellness Plan | 3 | 2 | 1 | 0 |
| A-4. Written Policies on Physical Activity | 3 | 2 | 1 | 0 |
| A-5. Breaks | 3 | 2 | 1 | 0 |
| A-6. Physical Activity Facilities | 3 | 2 | 1 | 0 |
| A-7. Employee Access to Physical Activity Facilities Outside of Work Hours | 3 | 2 | 1 | 0 |
| A-8. Written Policies on Nutrition | 3 | 2 | 1 | 0 |
| A-9. Written Policies on Tobacco Use | 3 | 2 | 1 | 0 |
| A-10. Staff Oriented to Policies | 3 | 2 | 1 | 0 |
| A-11. Plan to Respond to Cardiac Events | 3 | 2 | 1 | 0 |
| A-12. Emergency Response Training | 3 | 2 | 1 | 0 |
| Total the number of circled responses in each column | | | | |
| Multiply by the Point Value | X 3 | X 2 | X 1 | X 0 |
| Subtotals | | | | |
| Total Points Earned | <i>Add all subtotals</i> | | | |
| |  | | | |
| Total Possible Points | | | | 36 |
| Percentage (total points earned/36) x100 | | | | % |

Part A: Worksite Policies and Environment

Recommendation Table

Instructions: Rate each of the recommendations identified in the Worksite Policies and Environment Planning Questions on the following five aspects: importance, cost, time, commitment, and feasibility. Rate each on a scale of 1 to 5 using the chart below.

| | | | | | | | |
|------------------------|---|------|------|------------|-------------|--------------|------------------|
| Importance | How important is the recommendation? 5 = Very important 3 = Somewhat important 1 = Not very important | | | | | | |
| Cost | How expensive would it be to plan and implement the recommendation? 5 = Not expensive 3 = Moderately expensive 1 = Very expensive | | | | | | |
| Time | How much time and effort would be needed to implement the recommendation? 5 = Little or no time and effort 3 = Moderate time and effort 1 = Extensive time and effort | | | | | | |
| Commitment | How enthusiastic would the worksite community be about implementing the recommendation? 5 = Very enthusiastic 3 = Moderately enthusiastic 1 = Not enthusiastic | | | | | | |
| Feasibility | How difficult would it be to complete the recommendation? 5 = Not difficult 3 = Moderately difficult 1 = Very difficult | | | | | | |
| Recommendations | Importance | Cost | Time | Commitment | Feasibility | Total Points | Priority Ranking |
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Part A: Worksite Policies and Environment

Action Plan Worksheet

| Recommendations | Describe the recommendations from the Recommendation Table | | |
|------------------------------------|---|------------------------------------|------------|
| Activities | List the activities required to meet the recommendation/ | | |
| Materials, Resources and Personnel | List the individuals who will do the work, and the resources and tools they need to get the job done. | | |
| Time Frame | When will implementation begin? How long will it take to finish? | | |
| Recommendations | Activities | Materials, Resources and Personnel | Time Frame |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |

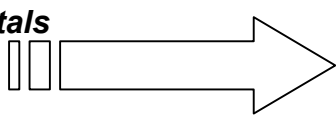
Appendix II - Tables and Worksheets

Part B: Health Promotion for Employees

Part B: Health Promotion for Employees

Score Card

Instructions: To complete this Score Card, first carefully read and discuss the Questionnaire. Answer the specific questions and follow the scoring descriptions. After all questions have been scored, respond to the Planning Questions for that section.

| | Fully In Place | Partially In Place | Under Development | No |
|---|--|--------------------|-------------------|-----|
| B-1. Healthcare Coverage for Staff | 3 | 2 | 1 | 0 |
| B-2. Health Screening for Staff | 3 | 2 | 1 | 0 |
| B-3. Physical Activity/Fitness Programs for Employees | 3 | 2 | 1 | 0 |
| B-4. Nutrition Education/Weight Management Programs for Employees | 3 | 2 | 1 | 0 |
| B-5. Promote and Encourage Employee Participation | 3 | 2 | 1 | 0 |
| B-6. Awareness and Education Messages | 3 | 2 | 1 | 0 |
| B-7. Budget for Employee Health Promotion | 3 | 2 | 1 | 0 |
| Total the number of circled responses in each column | | | | |
| Multiply by the Point Value | X 3 | X 2 | X 1 | X 0 |
| Subtotals | | | | |
| Total Points Earned | <i>Add All Subtotals</i>  | | | |
| Total Possible Points | | | | 21 |
| Percentage (total points earned/21) x100 | | | | % |

Part B: Health Promotion for Employees

Planning Questions

These planning questions will help your worksite use its Index results to identify and prioritize changes needed to improve your worksite wellness programs. Answers should be reviewed when completing the Recommendation Table.

1. Based on the scores earned for each question, what are the **strengths** and **weaknesses** of your worksite's health promotion for employees?

2. To improve each of the weaknesses identified in question 1, identify the recommendations for action.

Part B: Health Promotion for Employees

Recommendation Table

Instructions: Rate each of the recommendations identified in the Health Promotion for Employees Planning Questions on the following five aspects: importance, cost, time, commitment, and feasibility.

Rate each on a scale of 1 to 5 using the chart below.

| | | | | | | | |
|------------------------|---|------|------|------------|-------------|--------------|------------------|
| Importance | How important is the recommendation? 5 = Very important 3 = Somewhat important 1 = Not very important | | | | | | |
| Cost | How expensive would it be to plan and implement the recommendation? 5 = Not expensive 3 = Moderately expensive 1 = Very expensive | | | | | | |
| Time | How much time and effort would be needed to implement the recommendation? 5 = Little or no time and effort 3 = Moderate time and effort 1 = Extensive time and effort | | | | | | |
| Commitment | How enthusiastic would the worksite community be about implementing the recommendation? 5 = Very enthusiastic 3 = Moderately enthusiastic 1 = Not enthusiastic | | | | | | |
| Feasibility | How difficult would it be to complete the recommendation? 5 = Not difficult 3 = Moderately difficult 1 = Very difficult | | | | | | |
| Recommendations | Importance | Cost | Time | Commitment | Feasibility | Total Points | Priority Ranking |
| | | | | | | | |
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Part B: Health Promotion for Employees

Action Plan Worksheet

| Recommendations | Describe the recommendations from the Recommendation Table | | |
|------------------------------------|---|------------------------------------|------------|
| Activities | List the activities required to meet the recommendation. | | |
| Materials, Resources and Personnel | List the individuals who will do the work, and the resources and tools they need to get the job done. | | |
| Time Frame | When will implementation begin? How long will it take to finish? | | |
| Recommendations | Activities | Materials, Resources and Personnel | Time Frame |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |