

# Worksite Wellness Toolkit

For Small and Medium-Size Businesses



## LIVE WELL @ WORK


Prepared by:



LIVEWELLSD.ORG



In collaboration with:



**SCEDC**  
South County Economic  
Development Council

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# Acknowledgements

## Special Thanks

**San Diego Regional Chamber of Commerce** is the leading political advocate for business, and the nexus of connections and collaboration amongst businesses in the San Diego-Baja region. Through political advocacy on the city, county, and state level, we have fought to make San Diego a place where businesses can succeed and grow while creating jobs, supporting infrastructure, and ensuring that neighborhoods thrive. We hope you join us in our mission to make San Diego the best place to do business in California.

**North San Diego Business Chamber** is a regional Chamber of Commerce focusing on North County to build vibrant communities through stronger commerce. North San Diego Business Chamber is the only 5-star United States Chamber of Commerce accredited-organization in San Diego County. Only 10 chambers in California have earned accreditation, and 3% of chambers nationwide.

**South County Economic Development Council** promotes education and encourages economic development in the South San Diego County Region. Our member cities include Chula Vista, Coronado, Imperial Beach, National City, San Diego, San Diego County, and the Port of San Diego. We also work with our partners in the northern portion of Baja California in the cities of Mexicali, Tijuana, Tecate, Rosarito, and Ensenada.

## The **LIVE WELL @ WORK Worksite Wellness Toolkit For Small and Medium-Size Businesses**

We acknowledge the expertise and partnership of University of California, San Diego Center for Community Health for their support at different phases in the development of this user-friendly toolkit for small and medium-size businesses.



## Dear Business Partner:

The County of San Diego Health & Human Services Agency (HHSA), along with the San Diego Regional Chamber of Commerce, North San Diego Business Chamber, and South County Economic Development Council, are working together to help create a healthier workforce throughout San Diego County.

We know that chronic diseases are significant drivers of health care costs, and that the majority of American employees have at least one chronic health condition. These conditions are caused by lifestyle-related risk factors and account for more than 50 percent of deaths in the county. Considering the impact that employee health has on organizational performance, employee wellness is a critical factor to an organization's short- and long-term success. Health management initiatives, including workplace health promotion and wellness programs, help employees live healthier lives while at the same time improving employers' bottom line through reduced health care costs and increased productivity.

Recognizing that small and medium-size businesses may have limited resources to support workplace wellness initiatives, HHSA has partnered with the San Diego Regional Chamber of Commerce, North San Diego Business Chamber, and South County Economic Development Council to develop a simple, but effective, resource to benefit local businesses. Together, we created the **LIVE WELL @ WORK Worksite Wellness Toolkit For Small and Medium-Size Businesses** designed to offer easy, evidence-based approaches to employee health that can be implemented at low or no cost to employers.

The *Live Well San Diego* vision adopted by the County of San Diego Board of Supervisors, in 2010, includes three components. **Building Better Health** was the first component, launched in 2010, and focuses on improving the health of residents and supporting healthy choices; **Living Safely**, adopted in 2012, focuses on protecting residents from crime and abuse, making neighborhoods safe, and supporting resilient communities; and **Thriving**, adopted in 2014, focuses on cultivating opportunities for all people to grow, connect, and enjoy the highest quality of life.

*Live Well San Diego* strives to connect organizations of every kind—cities and governments, businesses, healthcare organizations, schools, and community and faith-based organizations—through a shared purpose. Business partners have the potential to improve local economies and have a positive influence on the health of employees, customers and communities. Working together, we are supporting healthy, safe and thriving individuals and families, businesses and communities by creating environments that make safe physical activity and eating healthy not only the obvious choice, but the easy choice.

The efforts of many partners to develop the **LIVE WELL @ WORK Worksite Wellness Toolkit For Small and Medium-Size Businesses** reflect *Live Well San Diego* strategic approaches. Most notably, these efforts support positive choices among employees and advance policy and environmental changes that make it easier for employees to make the healthy choice.

We hope you find the **LIVE WELL @ WORK Worksite Wellness Toolkit For Small and Medium-Size Businesses** a valuable resource in your journey to supporting employee health and wellness. We look forward to continuing our partnerships and efforts with you all in making San Diego County a healthy, safe and thriving place to live, work, and play.

### Live Well!

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# PROMOTING HEALTH IN THE WORKPLACE

Support your employees' health starting today. This toolkit was made possible by the Centers for Disease Control and Prevention (CDC), through the County of San Diego Health & Human Services Agency, in partnership with the San Diego Regional Chamber of Commerce, North San Diego Business Chamber, and the South County Economic Development Council.

**LIVE WELL @ WORK** supports employers throughout the county in enhancing worksite wellness programs to improve employee health. **LIVE WELL @ WORK** is a program of *Live Well San Diego*, the County of San Diego's strategic vision for a healthy, safe, and thriving region.

An additional resource that complements this toolkit is the **LIVE WELL @ WORK Resource Library**, an online clearinghouse of health information and resources that can assist employers and employees with worksite wellness programs and activities.

For more information about this toolkit and how to use it, contact:

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**LIVE WELL @ WORK** is a program of *Live Well San Diego: Healthy Works*, which is a collection of County-funded programs and interventions carried out by the County and contracting partners that advance the regional *Live Well San Diego* vision by addressing chronic disease and promoting health equity in San Diego County. For more information on other *Live Well San Diego: Healthy Works* programs and initiatives, visit [www.HealthyWorks.org](http://www.HealthyWorks.org). For more information on the County of San Diego's vision for a healthy, safe and thriving region, visit [www.LiveWellSD.org](http://www.LiveWellSD.org).

## TELL US WHAT YOU THINK

Once you've had a chance to review the toolkit, let us know how you intend to use it by completing an online feedback tool. Visit: [www.LiveWellSD.org/LWatW-Feedback](http://www.LiveWellSD.org/LWatW-Feedback)

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# INTRODUCTION

The **LIVE WELL @ WORK Worksite Wellness Toolkit For Small and Medium-Size Businesses** is a free resource to assist worksites with implementing strategies that have been proven to be effective. This toolkit is meant to help small and medium-size employers thrive in today's marketplace by providing worksite wellness information and resources that do not require a large budget to implement.

In this toolkit, you will find proven, step-by-step actions you can take to help keep your employees healthy and productive, from planning to implementation. Starting and maintaining a wellness program is not difficult. There are lots of simple strategies that can be done easily at little or no cost.

This toolkit takes you through **Four Basic Steps to Worksite Wellness** that allow you to customize a wellness program that makes the most sense for your worksite:



The **Appendices Section** contains ready-to-use tools for each step of the process. A **12-Month Action Plan** has simple strategies that can be rolled out according to monthly themes. There are free sample templates and assessment tools, a workplace safety training, websites, and additional resources to support your wellness programs.

This toolkit shows you ways to get started and make a difference in the health of your employees, regardless of the size of your worksite and its available resources.





# THE HEALTH OF AMERICA'S EMPLOYEES

**For the last 50 years or so, Americans have been becoming less healthy.** Five lifestyle issues (poor diet, stress, lack of exercise, smoking, and drinking alcohol) are responsible for an estimated 80 percent of the nation's health care budget due to higher rates of obesity, diabetes, heart disease, and high blood pressure. The cost of this decline in America's health is significant and far-reaching.

Though small and medium-size businesses are important to the U.S. economy, they face serious challenges in remaining competitive when employees are out sick or are less productive because of health-related issues. If the health of America's employees continues to worsen, the medical costs for treating these lifestyle-related conditions will continue to increase. This will make it very challenging for businesses to provide affordable health insurance to their employees, as well as remain competitive in their respective industries.



## THE PROBLEM:

**One in seven adults has heart disease and two in three adults are overweight or obese.** These health issues are associated with an estimated **\$4.6 billion** in direct healthcare costs for chronic disease in San Diego.

# THE HEALTH OF AMERICA'S EMPLOYEES (CONTINUED)

## Worksite Wellness: a Cost-Effective Solution

Worksite wellness programs have become an important way to ensure not only the lifelong health of the U.S. workforce, but also for maintaining a strong economy. **The biggest health issues facing American workers today are chronic conditions: obesity, diabetes, heart disease, and high blood pressure.** The good news is these costly conditions can improve, and even be prevented, with proven strategies.

Worksite wellness programs represent an important investment decision by employers. **Effective worksite wellness programs have been shown to have significant, positive outcomes for employers** such as yourself—outcomes that include:

- Better employee health
- Lower health insurance costs
- Fewer workers' compensation claims
- Less absenteeism and sick leave taken
- Higher job performance and productivity
- Happier, more satisfied employees

**Even small steps make a big difference** in the well-being of your company and employees, and they could result in saving thousands of dollars.

### What is the Goal of this Toolkit?

This toolkit is meant to help small and medium-size employers thrive in today's marketplace by providing worksite wellness information and resources that have been shown to produce results.

**In this toolkit you will find proven, step-by-step actions** you can take to help keep your employees healthy and productive, from planning to implementation. Starting and maintaining a wellness program is not difficult; there are lots of simple strategies that can be done easily at little or no cost.

Keep in mind that you do not have to do everything in this toolkit to have a positive impact on your employees' health. Each individual part of this toolkit can be customized by employers to meet their specific needs. The toolkit offers many suggestions on a variety of health issues that you can put into practice at any time.



# LIVE WELL SAN DIEGO: COLLECTIVE EFFORTS FOR COLLECTIVE IMPACT

*Live Well San Diego* is a regional vision adopted by the San Diego County Board of Supervisors in 2010, that aligns the efforts of County government, business and community partners, and individuals to help all San Diego County residents be healthy, safe, and thriving.

The vision includes three components. **Building Better Health**, adopted on July 13, 2010, focuses on improving the health of residents and supporting healthy choices; **Living Safely**, adopted on October 9, 2012, focuses on protecting residents from crime and abuse, making neighborhoods safe, and supporting resilient communities; and **Thriving**, adopted on October 21, 2014, focuses on cultivating opportunities for all people to grow, connect, and enjoy the highest quality of life.

*Live Well San Diego* encompasses community engagement on all levels. It starts with individuals and families who are leading efforts to be healthy, safe, and thriving and grows through County-community partnerships to convene working groups, conduct program activities, and leverage each other's resources and capabilities to improve the health, safety, and overall well-being of residents throughout San Diego County.

*Live Well San Diego* involves formally recognized partners in every sector—from government, to business, to schools, to faith-based and community organizations—through a shared vision for wellness across the region. Recognized partners are committed to improving their communities and are implementing innovative programs, policies, and practices that support healthy, safe, and thriving communities.

Business partners have the potential to improve local economies and have a positive influence on the health of employees, customers, and communities. Working together, *Live Well San Diego* partner businesses are sharing best practices and advancing initiatives that not only benefit their workforce and clientele, but also enhance the healthy bottom line of individual companies and economic competition in the region as a whole.

It takes organizations throughout the region to reach all 3.3 million people living in San Diego County. With everyone working together, these common goals can be accomplished:

1. **Enhance efforts** to improve the delivery of services throughout the region.
2. **Support positive choices** so that residents and communities can take action.
3. **Create environments and adopt policies** that make it easier for everyone to live well.
4. **Improve the culture within** so that internal teams recognize the importance of their role.

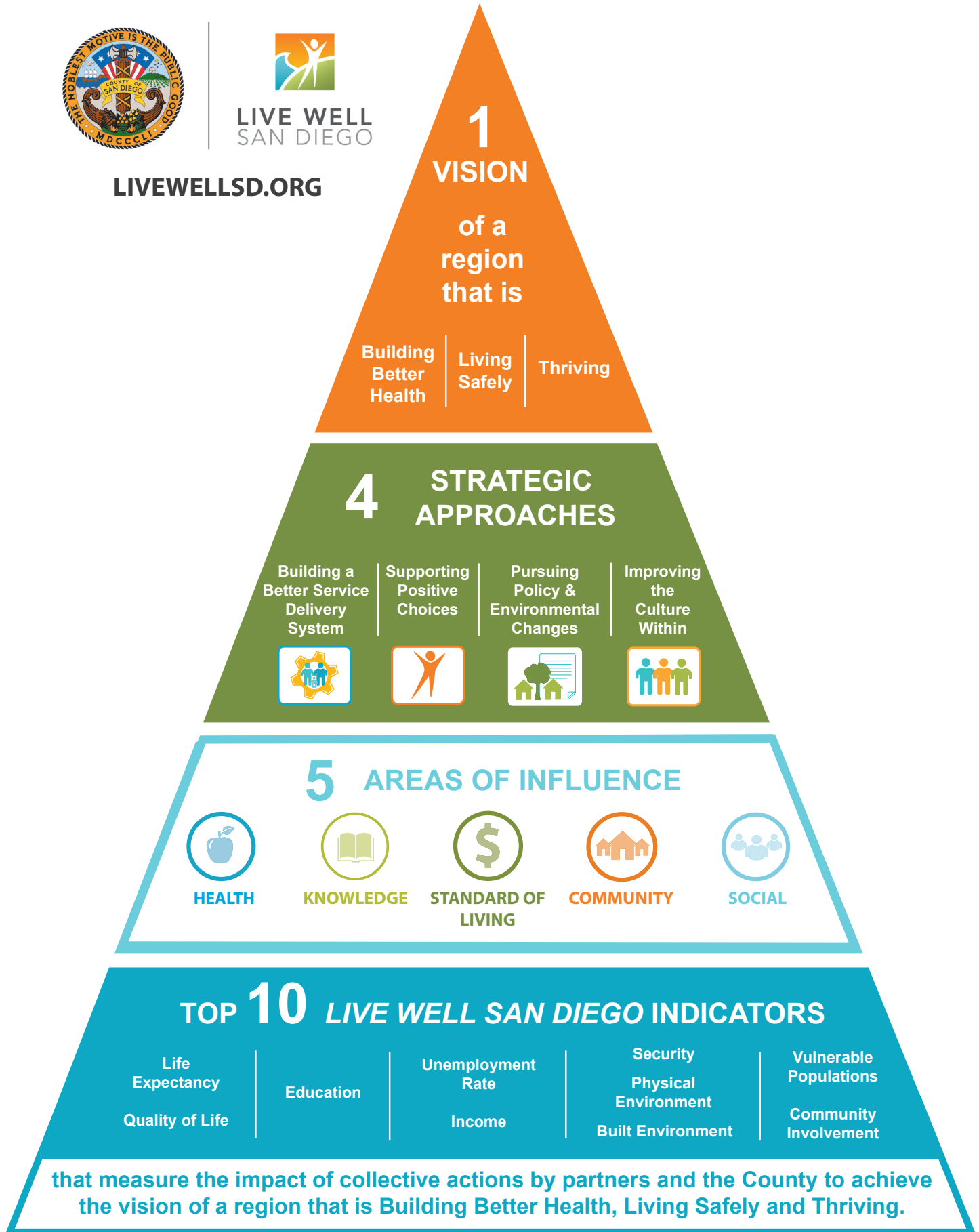
The efforts of small and medium-size businesses throughout the county reflect these strategies, most notably, supporting positive choices among employees and their families, and advancing policy and environmental changes that make the healthy choice the easy choice.

**Figure 1** on page 5 captures the vision, components, and strategic approaches of *Live Well San Diego*.

Figure 1: Live Well San Diego Pyramid



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**1**  
**VISION**

of a region that is

Building Better Health | Living Safely | Thriving

**4** **STRATEGIC APPROACHES**

- Building a Better Service Delivery System
- Supporting Positive Choices
- Pursuing Policy & Environmental Changes
- Improving the Culture Within

**5** **AREAS OF INFLUENCE**

- HEALTH
- KNOWLEDGE
- STANDARD OF LIVING
- COMMUNITY
- SOCIAL

**TOP 10 LIVE WELL SAN DIEGO INDICATORS**

- Life Expectancy
- Quality of Life
- Education
- Unemployment Rate
- Income
- Security Physical Environment
- Built Environment
- Vulnerable Populations
- Community Involvement

that measure the impact of collective actions by partners and the County to achieve the vision of a region that is Building Better Health, Living Safely and Thriving.

# TAKING STEPS TOWARD WORKSITE WELLNESS

**One of the most important first steps** in any worksite wellness program is to understand your employees' interests and needs. This will help you as a leader in your company to provide options and supports that meet those interests and needs as well as those of your own business. Many small employers with successful worksite wellness programs have also tapped into existing community resources (many of which are free or available at a very low cost) and have partnered with other businesses to support and share resources.

**REMEMBER:**  
ANY SMALL STEP  
MAKES A BIG DIFFERENCE  
IN THE WELL-BEING OF YOUR EMPLOYEES  
AND YOUR COMPANY!

## Things to consider...

- ✓ Review the practices and strategies described in this toolkit.
- ✓ Develop a plan based on your company's size, needs, interests, and available resources.
- ✓ Consider the literacy level of your employees when creating written worksite materials.
- ✓ Be mindful of the diversity, languages, and cultural differences among employees when developing worksite wellness programs.
- ✓ You do not need to do everything at once! Any small step toward health is important!

# FOUR BASIC STEPS TO WORKSITE WELLNESS



**ACCEPT THE CHALLENGE:  
BE A HEALTH CHAMPION FOR YOUR BUSINESS!**



## ASSESS YOUR EMPLOYEE AND WORKSITE NEEDS



Regardless of whether your organization already has a worksite wellness program in place or is starting from scratch, planning is a critical first step. Begin by assessing your employees' needs and interests to help you identify where you can best focus your efforts and be successful. Identify someone in your organization that can help champion your wellness efforts and get others excited about it. And don't overlook the importance of making sure your organization's leaders support the goals of improved employee health and wellness. These key components will set you up for success!

### Assess Your Work Environment:

**Why assess your work environment?** Simple: it will give you a clear understanding of what resources and strengths your business already has that support employee wellness, as well as the areas that offer opportunities for improving employee health. A scan typically includes reviewing things such as existing health-related policies, food and physical activity environments, existing programs and employee health benefits and claim data.

Sample Environmental Assessments:

- [The Centers for Disease Control and Prevention Worksite Health Scorecard](#)
- [Indiana Healthy Worksites Toolkit for Small Businesses \(pages 5-8\)](#)

### Conduct a Healthy Lifestyle Interest Survey:

**A key part of this environmental scan is healthy lifestyle interest survey.** It can give you a better understanding of your employees' current health habits and interests. By how your employees feel about workplace wellness programs and the specific activities they have an interest in, your business can take significant steps toward keeping your employees healthy and productive.

**Successful worksite wellness programs meet the needs and interests of their employees.** Employees are more willing to participate in and support wellness efforts if they are involved in the decision-making process.

There are already a number of short and useful surveys that are available to help you get the job done. But if you choose to develop your own set of survey questions, consider the guidelines outlined on the following page.



## Conduct a Healthy Lifestyle Interest Survey *(Continued)*:

- **Make sure you address the major areas associated with health and productivity.**
  - ✓ Physical activity      ✓ Medical self-care      ✓ Financial wellness      ✓ Nutrition
  - ✓ Weight management    ✓ Stress management    ✓ Worksite Safety
- **Keep it short:** Suggest no more than **25 questions**. See sample surveys in [Appendix 1](#).
- **Use scaled questions:** Scales might range from 1 to 4, with 1 being most interested and 4 being least interested. Avoid yes/no questions, as they won't give you as much information.
- **Develop a cover letter:** This letter should come directly from your top business leader. Make sure to include a statement about confidentiality and anonymity. See sample in [Appendix 2](#).
- **Set a time frame:** The recommended time frame for the survey to be completed is at least 5 working days, but not more than 2 weeks.
- **Provide incentives** (Optional—not essential!)
- **Develop a report:** Compile the results and develop a summary report that describes the key findings. The report should be no more than 5 pages.
- **Communicate results:** This provides opportunities for management and staff to ask questions and for you to obtain additional information.
- **Share the results:**
  - By email or interoffice mail.
  - At company meetings or employee forums.
  - In a face-to-face meeting with your management team.

## Things to consider...

Based on this survey, you may find that some ideas for supporting employee health are easy to put into practice, while others may not be easy or even possible under current circumstances. **It's up to you to determine what's truly realistic for your business.** Survey results can also be used as a baseline measure, or starting point, to track progress as your business begins to make changes. More information on environmental scans can be found in the Resources section in [Appendix 3](#).





## SELECT A WELLNESS CHAMPION



Many businesses have wellness teams or committees responsible for developing worksite wellness programs. But for many small and medium-size businesses, creating a wellness team might not be possible. Don't worry! It's not necessary to create a wellness committee in order to improve employee health.

### Selecting a Wellness Champion:

You won't need a full-time person to fill this role. **Here are some qualities to consider** when looking for a wellness champion among your existing employees:

- **Enthusiasm:** Identify someone who is eager, excited, and energetic. These qualities will generate interest and motivate others.
- **Task-oriented:** There will be specific and concrete things that need to be accomplished within a specific time.
- **Attention to detail:** This needs to be high on your list.
- **Likeability:** Your employees will be more motivated by someone they like.
- **A willingness to help others:** Essential!
- **Personal commitment to a healthy lifestyle:** This person doesn't need to be an athlete. In fact, it's probably better if they are not. A wellness leader committed to health will go a long way toward building your worksite wellness effort and keeping people energized and engaged over the long run.



## GET SUPPORT FROM MANAGEMENT



Top level buy-in or support of management is one of the most important pieces of building and sustaining a wellness program in a small business setting.

### Strategies to Help Get Management Support for Improved Employee Health:

- **Make the business case for worksite wellness programs:**  
There are articles, expert interviews, presentations, and other resources available for free on the internet that can help you with worksite wellness. (Also, see the Resources section in [Appendix 3](#) at the end of this toolkit for more information.)
- **Present employee testimonials:**  
Talk with employees. Discuss personal health issues and how these issues impact their lives and work performance. Share these stories with your management to help make the case for health.
- **Connect with other businesses that support worksite wellness:**  
You will find many testimonials online from leaders of small and medium-size companies. Reach out to other businesses in your community that are already taking steps to improve employee health.
- **Show your organization's leadership how other small and medium-size businesses have done it.**

### Things to consider...

**Support from management is essential** to building and sustaining a successful wellness program. It can impact many things, including:

- ✓ Availability of funding for the wellness program.
- ✓ Support for employee participation in wellness activities.
- ✓ Implementation of safety and wellness policies.



## COMMUNICATE A SAFETY AND WELLNESS VISION



This is a key action any business can take to advance wellness within the organization. If you want healthier employees, your organization's leadership should let them know that safety, wellness, and healthy lifestyles are important priorities. Develop a brief vision statement that addresses the safety, health, and well-being of each and every employee within the organization.

### Tips for Crafting a Safety and Wellness Vision:

- Develop no more than **one double-spaced, typewritten page**.
- It should be **easy to communicate** and **easy to understand**.
- It should **paint a visual picture of health** for both your employees and the organization.
- It should be **written with the best interests of the employee** in mind.
- It should **establish an expectation that everyone will support it**.

### Strategies to Improve Worksite Safety:

- Provide a "Hazards in the Workplace" training to all employees. See sample training materials in [Appendix 4](#).
- Implement a safety awareness initiative such as "Spot the Hazard" (see [Appendix 5](#)) to encourage employees to actively participate in timely identification and elimination of hazards in the workplace.
- Complete a Facility Safety Assessment (see [Appendix 6](#)) to identify hazards, make a plan, and track actions taken to correct them.

### Things to consider...

Positive role modeling doesn't mean that your organization's leader needs to be an athlete. **The key here is to be sincere, genuine and transparent in the desire to lead a healthier lifestyle.** It's okay to be someone who struggles with the same kind of issues as everyone else. Building a culture of health involves all levels of the organization and establishes workplace health as a daily part of business operations that support overall business goals.



## CONDUCT AN ANNUAL HEALTH SCREEN AND HEALTH RISK ASSESSMENT

If employees don't know or understand their present personal health status, they are unlikely to know what, when, and how much to change. At a minimum, an employee should assess their cholesterol levels, blood pressure, blood sugar, and Body Mass Index (BMI).

### Annual Health Screening Assessment:

#### INTERNAL:

Team members take on tasks such as writing the communication pieces, developing and sending out invitations, creating registration protocols, setting up the screening area, finding appropriate professionals to conduct medical screenings, establishing incentives, and implementing wellness activities. Using internal staff requires resources, but it gives your team control of the process.

#### EXTERNAL:

Check if your health insurance provider, a local hospital, healthcare group, or other healthcare provider can offer free or low-cost screening and assessment for your employees either on site or at a particular location. The advantage to this approach is that trained professionals support the entire process.

#### OUTSOURCING:

Contract with an outside firm that specializes in delivering high-quality health screening services for businesses and worksites.

Advantages of outsourcing:

- Health screening is a core competency of the organization.
- Staffed by professionals who are qualified to conduct the screenings.
- Testimonials and/or references.
- Longevity and experience.

### Health Risk Assessment:

A Personal Wellness Profile covers areas such as medical conditions, lifestyle habits, general health status, emotional well-being and biometric data consisting of blood glucose, cholesterol and blood pressure results. Risk factor analysis of this data highlights areas for improvement, minor concerns or major problems. **This information helps the participant make informed decisions about managing their health.** An experienced program counselor to guide participants through interpreting results is essential.



## DEVELOP A PLAN WITH GOALS AND OBJECTIVES



Use the results from the organizational scan, employee survey, annual screening, and health risk assessment to set priorities and develop a Worksite Action Plan (see [Appendix 7](#)).

### Creating Goals and Objectives:

- **Goals are general guidelines** that explain what you want to achieve.
- **Objectives lay out the strategies** or steps needed to reach the identified goal. See the 12-Month Action Plan provided in [Appendix 8](#) for suggested strategies.
- **Measurable outcomes should be included to determine employee interest** before, during, and after the program's completion. Was the program interesting, educational, and something that they would like to continue?
- **Assessment strategies: Determining and including assessment methods** in your operational plan is important. Identifying, collecting, and evaluating data from the beginning allows you to see if your goals are being reached and helps to establish important baselines for ongoing program planning and design.
- **Timelines: The plan should also include timelines** of when each strategy should be achieved.
- **Tracking employee feedback** to determine whether or not the program needs to be modified, continued, or terminated is also an element of the plan.
- Once you have completed these steps, you will be ready to take action. See [Design and Implement Programs](#) on page 16.

### Things to consider...

When developing a plan with goals and objectives:

- ✓ **Provide your employees with options** that meet their needs and interests as well as your business needs.
- ✓ **Tap into existing community resources** and also partner with other businesses.
- ✓ **Develop a Worksite Action Plan** (see [Appendix 7](#)) that aligns with your company goals, objectives, and budget.



## FIVE APPROACHES FOR EFFECTIVE PROGRAMS



Effective worksite health and wellness programs typically incorporate comprehensive management, health promotion, and disease management strategies.

### Five Approaches:

**APPROACH 1:** Screenings, health risk assessments, and referrals. Includes strategies that link employees to health education and counseling, screening programs (preferably linked to medical care service delivery to ensure follow-up), and appropriate treatment as necessary and to encourage adherence.

**APPROACH 2:** Frequent and simple prevention messages. Posters, newsletters, e-mails, and websites can increase employee awareness to take action.

**APPROACH 3:** Environmental support for healthy lifestyles. An environmental support can be social, physical, or economic. These types of strategies are aimed at increasing opportunities or reducing barriers for healthy choices within the worksite.

**APPROACH 4:** Policies and financial incentives that support healthy lifestyles. A policy is a written rule or guideline that describes how the organization supports healthier behaviors in the worksite.

**APPROACH 5:** Employee health education that focuses on skill development and lifestyle change. Health education classes, workshops, and medical self-care are all ways to improve employee health.

See [Appendix 9](#) for sample Wellness Strategies Checklist that cover all five approaches.

## External Resources...

- ✓ Health plans and health promotion/wellness vendors.
- ✓ Not-for-profit organizations (e.g., American Heart Association, American Diabetes Association, American Cancer Society).
- ✓ Physicians, pharmacists, hospitals, local health clubs/YMCAs, colleges/universities, and business health coalitions.
- ✓ Governmental agencies, such as the Centers for Disease Control and Prevention (CDC) and state or local health departments.
- ✓ Professional organizations (e.g., American College of Occupational and Environmental Medicine or National Association of Chronic Disease Directors).



## DESIGN AND IMPLEMENT PROGRAMS



When developing a program, keep it simple. It must be easy for the employees to understand and provide activities in which every employee can participate. Focus on topics and activities that are of greatest interest to employees and the greatest need of the company, in that order. Make sure activities include awareness, education, and components that address behavior.

### Get Focused:

The beginning of this toolkit discusses **five lifestyle issues (poor diet, stress, lack of exercise, smoking, and drinking alcohol)** which are responsible for an estimated 80 percent of the nation's healthcare budget. Many of the costs associated with these behaviors are related to preventable illnesses such as diabetes, heart disease, and high blood pressure.

Examples of worksite wellness programs include the following strategies which **communicate, promote, and encourage**:

- Daily physical activity on and off the job.
- Healthy eating and weight management.
- Tobacco-free environments.
- Responsible alcohol use.
- A culture and mindset that value safety.
- Appropriate use of the medical system.

### Helpful Strategies...

- ✓ A list of 20 "Healthy Hints for Employees" can be found in [Appendix 10](#). This handout can be shared in an e-mail blast, posted on a bulletin board, or shared at a meeting.
- ✓ Another strategy is to implement a *Meet Well Pledge* which assists staff in modeling healthy choices, especially for food and beverages purchased for all internal and external meetings, trainings, and events. The *Meet Well Pledge* does not dictate what individual staff members eat or bring into the office for personal consumption. See [Appendix 11](#) for a sample pledge.



## SELECT INCENTIVES



Incentives encourage employees to participate in the wellness program and to adopt or maintain positive behaviors that can help them stay healthy and live longer. Incentives can be used to help individuals change or adhere to healthy behaviors. Providing incentives and rewards will send an important message to employees that your company is committed to helping them improve their health.

### Tips on Selecting Incentives:

The following are some **tips on selecting appropriate incentives**:

- Use an employee survey to learn what incentives they value.
- Find out what incentives the organization can provide, as well as what the budget will allow.
- Ensure that every participant who achieves a goal receives some form of recognition.
- Avoid offering incentives for the “Best” or the “Most.”
- Be aware of any legal restrictions involved in offering incentives.
- Ensure appropriate use of the medical system.

### Things to consider...

Approximately 2/3 of all U.S. employers offer some kind of incentive for wellness program participation.

#### **The most commonly used incentives are as follows:**

- ✓ Non-cash incentives, such as t-shirts, gym bags, and water bottles.
- ✓ Gift cards or gift certificates.
- ✓ Health benefit incentives, such as reimbursement for wellness program costs or cash incentives.





## ASSESS YOUR PROGRESS



Assessment is a way to measure whether or not your efforts have made a difference for your employees and in your worksite. It can be a simple and practical way to highlight your efforts, improve those efforts, and determine if your efforts have increased employee access to healthier opportunities. This step does not need to be complicated, expensive, or time-consuming.

To assess your progress, review page 2 of the Worksite Action Plan (see [Appendix 7](#)), environmental assessments conducted, employee or leadership feedback received, or data collected that can help showcase your efforts.

### Measuring Progress and Success:

**Measuring progress, successes, and failures is essential for sustaining worksite wellness efforts.** This helps support developing new initiatives and doesn't require sophisticated techniques.

Some ideas to consider for measuring your wellness program include:

- Health Risk Assessment (HRA) scores.
- Number of participants at health-related events.
- Employee satisfaction with health programs.
- Results such as total pounds lost, miles walked, number of smokers who have quit, etc.
- Policies changed or developed, or worksite environmental changes implemented, etc.
- Direct observations of employee participation in events/activities.
- Other materials such as newsletters.

### Next Steps...

- ✓ Complete the evaluation sections on your Worksite Action Plan. See [Appendix 7](#).
- ✓ Identify what did/didn't work to decide what to change, if you continue working on the goal.
- ✓ Offer suggestions or ideas on how to improve the efforts.
- ✓ Share the information you learned with others.
- ✓ Share a report on the impact of the activities with your employees.
- ✓ Use your results to request more funding or grants to continue your efforts.



## SUSTAINING YOUR WORKSITE WELLNESS PROGRAM



Sustaining your worksite wellness program includes maintaining it while continuing to develop it. Annual planning serves as a frame for decision-making and feedback. It helps maintain focus and assists with tracking your annual achievements, challenges, and the financial aspects of the program. In order to sustain your program, make sure long-term planning is included as an integral part of the process. Annual planning and assessment are essential to the maintenance and growth of the wellness program. Re-evaluating the past year's successes and challenges while being flexible and creative with your process is essential to sustainability.

### Long-Term Planning:

**Long-term planning is an integral part of sustainability.** A five-year plan should include a long-term focus for your wellness program. This assists in setting annual goals and budget guidelines, as well as in tracking growth and documenting results. This is a working document that can be adjusted annually as more data is obtained or, due to some obstacle or challenge, the focus can be shifted.

Some common goals for long-term planning might address: containing healthcare costs, improving productivity and turnover, reducing absenteeism, reducing injuries, or improving employee morale.

#### Ask questions when setting out long-term plans such as:

- How will this plan contribute to the company's success?
- How will the safety and wellness program grow?
- What annual goals can be developed that are measurable?
- What sort of plan can be added to assess each program and the overall goal?

### Things to Consider...

An annual budget can be made up of several components, but most wellness program budgets commonly have an "operations" section that includes such things as supplies, incentives, costs of memberships or educational activities, and program staffing. Budget growth is not always necessary for program growth. Variety in programs can be offered in different years to keep interest and growth without expanding the budget.



## Celebrate Success: Provide Recognition

Recognition is an important motivator for employers and employees alike. Wellness programs may take time to produce results both on an individual and organizational basis. Recognizing individuals who take steps to improve their health, and for businesses and organizations that support health, can be a motivating factor to sustain the effort.



## REFERENCES

The content of this toolkit was adapted from the sources below. For further information on how to implement the wellness strategies listed in this toolkit, please visit the referenced websites provided.

*Knox County Health Department: Worksite Wellness Toolkit for Small Businesses.* (n.d.). (pp. 1-7). Retrieved from [https://knoxcounty.org/health/pdfs/worksite\\_wellness\\_toolkit.pdf](https://knoxcounty.org/health/pdfs/worksite_wellness_toolkit.pdf)

Morgan, J. (n.d.). *Small Business Worksite Wellness Strategies.* Retrieved from <http://www.dhs.wisconsin.gov/publications/p0/p00639.pdf>

*The CDC Worksite Health Scorecard: An Assessment Tool for Employers to Prevent Heart Disease, Stroke, & Related Health Conditions.* (2014). CDC - National Center for Chronic Disease Prevention and Health Promotion - Division of Heart Disease and Stroke Prevention. Retrieved from [http://www.cdc.gov/dhdsp/pubs/docs/hsc\\_manual.pdf](http://www.cdc.gov/dhdsp/pubs/docs/hsc_manual.pdf)

*WorkWell NC Toolkit: Eat Smart Move Smart.* (n.d.). Retrieved from [http://workwellinc.com/links/toolkit/WWNC\\_Toolkit\\_1-17-12.pdf](http://workwellinc.com/links/toolkit/WWNC_Toolkit_1-17-12.pdf)

NSBA and Humana. (n.d.). *Workplace Wellness Programs in Small Business: Impacting The Bottom Line.* Retrieved from <http://www.nsba.biz/wp-content/uploads/2012/09/wellness-survey-v3.pdf>





### Activities that Promote a Safer and Healthier Workplace

The following pages provide a quick reference guide for possible programming elements to include in your worksite wellness program. This guide is designed around core elements of a comprehensive worksite health promotion program and includes suggestions for businesses that are just beginning, have already started, or are advanced in their programs.

- ✓ As a reminder, **you do not have to tackle everything at once**; not every strategy needs to be incorporated at your worksite. The following checklists offer suggestions for employers that want to achieve optimal results in specific worksite wellness program areas.
- ✓ You can identify strategies to implement right away (1-3 months), some to implement at near future (3-6 months), and others to implement in the long-term (6-12 months).

**Even small steps can make a big difference** in the safety and well-being of your company and its employees, and it could result in saving thousands of dollars.

#### REMEMBER - WE WANT TO HEAR FROM YOU

Once you've had a chance to review the toolkit, let us know how you intend to use it by completing an online survey.

Visit: [www.LiveWellISD.org/LWatW-Feedback](http://www.LiveWellISD.org/LWatW-Feedback)

## Sample Needs and Interest Survey



Please indicate how likely you would be to participate in each of the following programs if they were offered at work during the next year.

	Extremely Likely 1	Likely 2	Somewhat Likely 3	Unlikely 4
1. Body Fat Testing	1	2	3	4
2. Educational Programs:				
a) Back Safety	1	2	3	4
b) Cancer Prevention	1	2	3	4
c) Heart Disease Prevention	1	2	3	4
d) Stroke Prevention Programs	1	2	3	4
e) Cholesterol Reduction	1	2	3	4
f) Home Safety	1	2	3	4
g) Substance Abuse Prevention	1	2	3	4
h) Headache Prevention & Treatment	1	2	3	4
i) Cold/Flu Prevention & Treatment	1	2	3	4
3. Employee Assistance Programs:				
a) Depression Treatment	1	2	3	4
b) Financial Management	1	2	3	4
c) Job Stress Management	1	2	3	4
d) Accepting Change	1	2	3	4
e) Parenting Difficulties	1	2	3	4
f) Managing Chronic Health Conditions (diabetes, hypertension,...)	1	2	3	4
g) Managing Chronic Pain (neck & shoulder injuries, back injuries,...)	1	2	3	4
h) Controlling Anger/Emotions	1	2	3	4
4. Fitness Programs:				
a) Corporate Fitness Membership Rates	1	2	3	4
b) Exercise Tolerance (STRESS) Testing	1	2	3	4
c) Onsite, Low-Impact Exercise Equipment	1	2	3	4
d) Prescribed Exercise Programs	1	2	3	4
e) Stretching Programs	1	2	3	4
f) Walk-Fit Programs	1	2	3	4

# APPENDIX 1

## Sample Needs and Interest Survey (Continued)

	Extremely Likely	Likely	Somewhat Likely	Unlikely
5. Immunization Programs:				
a) Flu Shots	1	2	3	4
b) Tetanus Shots	1	2	3	4
c) Hepatitis 'B' Vaccine	1	2	3	4
6. Nutrition Education Programs:	1	2	3	4
a) Healthy Cooking (meals/snacks)	1	2	3	4
b) Healthy Eating (do's & don'ts)	1	2	3	4
c) Weight Management Programs (diet & exercise)	1	2	3	4
d) Onsite Vending Machines with Healthy Choices	1	2	3	4
7. Screening Programs:	1	2	3	4
a) Blood Pressure Checks	1	2	3	4
b) Blood Sugar (diabetes)	1	2	3	4
c) Cholesterol Levels	1	2	3	4
d) Multiphasic Blood Screens	1	2	3	4
e) Colon/Rectal (cancer)	1	2	3	4
f) Mammograms	1	2	3	4
g) Vision	1	2	3	4
h) Other (specify)	1	2	3	4
8. Smoking Cessation Programs	1	2	3	4
9. Stress Reduction Programs	1	2	3	4
10. Time Management Programs	1	2	3	4
11. Visiting Onsite Healthcare Nurse	1	2	3	4
12. Self Help/Self Care	1	2	3	4
13. Health Promotion Programs	1	2	3	4
a) Before Work	1	2	3	4
b) During Lunch at Work	1	2	3	4

## Sample Cover Letter from CEO



[Company logo]

### Sample - Worksite Wellness Program Announcement from CEO

Subject: Worksite Wellness Program Announcement

Dear [Company] Employees,

There is a lot of talk these days about the importance of good nutrition, physical activity, and stress reduction. In an effort to promote health and wellbeing among [Company] employees, we are starting [a comprehensive Worksite Wellness Program], open to all [Company] employees that includes [nutrition education, fitness activities, weight loss groups, and intervention programs,] to help with [smoking cessation and stress reduction].

An internal Wellness Committee has been formed, and their names and emails are listed below. This team is carefully considering a range of activities to help employees find support and ideas for making healthy choices and meeting their own wellness goals, and they need your input to further develop this program. [Attached you'll find a short survey that should take just a few minutes of your time. *All survey responses are completely anonymous.*]

Your ideas and opinions are important to us. It is vital that we hear from everyone in the organization in order to make our new Worksite Wellness Program a success. We look forward to incorporating your ideas and suggestions to create activities and programs that will become an exciting part of our culture here at [Company].

Please submit your survey to [name/email] no later than [date].

Sincerely,

[Wellness Lead or CEO]

### [Company]'s Wellness Program Committee

Name Email  
Name Email  
Name Email  
Name Email



## Resources



### Developing and Improving Worksite Wellness Programs

**CDC's Successful Business Strategies to Prevent Heart Disease and Stroke Toolkit:** This toolkit provides information, materials, tools, and resources that employers can use in developing comprehensive heart disease and stroke worksite programs and preventive services. [http://www.cdc.gov/dhdsdp/pubs/employers\\_toolkit.htm](http://www.cdc.gov/dhdsdp/pubs/employers_toolkit.htm)

**The NCCDPHP Workplace Health Promotion Website:** This website contains information, tools, guidelines and resources to guide employers on ways to establish or improve their workplace programs. <http://www.cdc.gov/chronicdisease/resources/publications/aag/workplace-health.htm>

### Health Insurance Coverage

**The Guide to Clinical Preventive Services:** Developed in collaboration with the National Business Group on Health and the CDC, the Guide translates clinical guidelines and medical evidence, providing large employers with the information they need to select, define, and implement preventive health benefits such as hypertension and lipid screening, counseling, and treatment. <http://www.ahrq.gov/professionals/clinicians-providers/guidelines-recommendations/guide/index.html>

### Lactation

**The CDC Guide to Breastfeeding Interventions:** This resource contains a chapter on lactation supports in the workplace that provides evidence on the effectiveness of workplace lactation support programs, details the components of these programs, and gives examples of these programs that have been successfully implemented by employers. <http://www.cdc.gov/breastfeeding/resources/guide.htm>

**The National Business Group on Health's Investing in Workplace Breastfeeding Programs and Policies:** This toolkit provides employers with information on the benefits of a lactation support program, how to start a lactation support program at their worksite, the components and options for a support program, and employer case studies of implementing these programs. <https://www.businessgrouphealth.org/pub/f2ffe4f0-2354-d714-5136-79a21e9327ed>

### Tobacco Control

**CDC's Tobacco Webpage:** This website provides a variety of information on tobacco including data and statistics, effective policies, programs and campaigns, recommended strategies, and other resources for consumers and the health professional. It includes a link to a PDF that discusses the importance of health insurance coverage for tobacco cessation services. <http://www.cdc.gov/tobacco/>

Within the tobacco page is the Public Health Services (PHS) Guideline for Effective Cessation Treatments that focuses on smoking cessation. [http://www.cdc.gov/tobacco/quit\\_smoking/cessation/coverage/index.htm](http://www.cdc.gov/tobacco/quit_smoking/cessation/coverage/index.htm)

**The Purchaser's Guide to Clinical Preventive Services:** The "Tobacco Use Treatment" chapter of *The Purchaser's Guide to Clinical Preventive Services* describes the importance of developing, implementing, and evaluating a comprehensive tobacco dependence treatment benefit. Tobacco use treatment has been ranked as one of the top three preventive services in terms of impact, cost effectiveness, and effectiveness. Summary Plan Description (SPD) language and coding for benefit implementation is included. <http://www.ahrq.gov/professionals/clinicians-providers/guidelines-recommendations/guide/index.html>

**Tobacco Cessation Benefit Coverage and Consumer Engagement Strategies: A California Perspective:** This report summarizes current employer coverage of smoking cessation benefits. To what degree do large California employers currently offer such benefits? Of those that offer them, what treatments do they cover? In addition, the report summarizes knowledge about the use of such services among employees and the barriers that may prevent them from tapping this important resource. [http://www.pbgh.org/storage/documents/reports/PBGH-CDC\\_TobaccoCessation\\_06-2008.pdf](http://www.pbgh.org/storage/documents/reports/PBGH-CDC_TobaccoCessation_06-2008.pdf)

## APPENDIX 3

### Resources (continued)

Tobacco Control (Continued)
<p><b>Investing in Health: Proven Health Promotion Practices for Workplaces:</b> Included in this guide are steps any employer can take to improve employee health by reducing tobacco use and exposure; promoting breast, cervical, and colon cancer screening and early detection; and encouraging physical activity and healthy eating. <a href="https://innovations.ahrq.gov/qualitytools/investing-health-evidence-based-health-promotion-practices-workplace">https://innovations.ahrq.gov/qualitytools/investing-health-evidence-based-health-promotion-practices-workplace</a></p>
Physical Activity
<p><b>Physical Activity Guidelines for Americans:</b> This website provides information on the 2008 Physical Activity Guidelines for Americans. The guidelines address physical activity for Americans of all ages including special populations. <a href="http://www.health.gov/paguidelines/">http://www.health.gov/paguidelines/</a></p> <p><b>National Physical Activity Plan:</b> This website provides information on the U.S. National Physical Activity Plan, a comprehensive set of policies, programs, and initiatives that aim to increase physical activity in all segments of the American population. There is a section of the plan focused on business and industry. <a href="http://www.physicalactivityplan.org/theplan.php">http://www.physicalactivityplan.org/theplan.php</a></p> <p><b>Physical Activity Workplace Toolkits:</b> This website provides links to toolkits that address reducing barriers and increasing access to places for physical activity in the work place. <a href="http://www.cdc.gov/nccdphp/dnpao/hwi/toolkits/">http://www.cdc.gov/nccdphp/dnpao/hwi/toolkits/</a></p> <p><b>Worksite Policies:</b> This website contains specific policies that affect health promotion at federal workplaces. Workplaces that are not federal agencies can use this information to generate ideas about how policies may impact health promotion in their organization. <a href="http://www.cdc.gov/nccdphp/dnpao/hwi/policy/">http://www.cdc.gov/nccdphp/dnpao/hwi/policy/</a></p> <p><b>CDC's Physical Activity:</b> This website provides a variety of information on achieving and maintaining a healthy weight including important information on weight assessments, balancing calories, health effects of overweight and obesity, and other resources. <a href="http://www.cdc.gov/physicalactivity/">http://www.cdc.gov/physicalactivity/</a></p> <p><b>Active Environments:</b> This website links to public health, community design, and related sites that complement active environment efforts. <a href="http://www.cdc.gov/physicalactivity/community-strategies/index.htm">http://www.cdc.gov/physicalactivity/community-strategies/index.htm</a></p>
Nutrition
<p><b>CDC's Nutrition:</b> This website provides a variety of information on nutrition including data and statistics, programs and campaigns, recommended strategies, and other resources for the health professional. <a href="http://www.cdc.gov/nutrition/">http://www.cdc.gov/nutrition/</a></p> <p><b>CDC Healthier Worksite Initiative - Nutritious Eating Toolkits:</b> This website is designed specifically for worksites to encourage nutritious eating and contains checklists, guides, budgets, and other tools to aid in program planning, design, and management. <a href="http://www.cdc.gov/workplacehealthpromotion/tools-resources/workplace-health/nutrition.html">http://www.cdc.gov/workplacehealthpromotion/tools-resources/workplace-health/nutrition.html</a></p> <p><b>CDC Healthier Worksite Initiative - Establish a Garden Market:</b> This toolkit provides information on how to establish a garden market in a federal agency or other organization, and demonstrates how it works at the CDC. <a href="http://www.cdc.gov/healthylives/healthtopics/healthyfood/community.htm">http://www.cdc.gov/healthylives/healthtopics/healthyfood/community.htm</a></p> <p><b>Choosing Foods and Beverages for Healthy Meetings, Conferences and Events:</b> This resource provides guidelines for selecting healthful foods and beverages for breaks or meals at workplace meetings, conferences, and events. <a href="http://www.cdc.gov/nccdphp/dnpa/pdf/Healthy_Worksite_Food.pdf">http://www.cdc.gov/nccdphp/dnpa/pdf/Healthy_Worksite_Food.pdf</a></p> <p><b>Improving the Food Environment through Nutrition Standards - A Guide for Government Procurement:</b> This resource provides practical guidance to states and localities for use when developing, adopting, implementing, and evaluating a food procurement policy. <a href="http://www.cdc.gov/salt/pdfs/dhdsp_procurement_guide.pdf">http://www.cdc.gov/salt/pdfs/dhdsp_procurement_guide.pdf</a></p> <p><b>CDC's Overweight and Obesity Website:</b> This website provides a variety of information on overweight and obesity including obesity trends, economic consequences, state-based programs, recommended strategies, and other resources for the health professional. <a href="http://www.cdc.gov/obesity/">http://www.cdc.gov/obesity/</a></p>

## Resources (continued)

### Health Screening and Disease Management

**CDC's High Blood Pressure Website and CDC's High Cholesterol Website:** These two websites provide a variety of information on high blood pressure and cholesterol including trends and statistics, economic consequences, state-based programs, related CDC Websites, recommended strategies, and other resources for patients and professionals. <http://www.cdc.gov/bloodpressure/> and <http://www.cdc.gov/cholesterol/>

**The Guide to Clinical Preventive Services:** Developed in collaboration with the National Business Group on Health and the CDC, the Guide translates clinical guidelines and medical evidence, providing large employers with the information they need to select, define, and implement preventive health benefits such as hypertension and lipid screening, counseling, and treatment. <http://www.ahrq.gov/professionals/clinicians-providers/guidelines-recommendations/guide/index.html>

**National Heart, Blood, Lung Institute:** This website includes publications, fact sheets, websites, and interactive web applications such as Your Guide to Lowering High Blood Pressure and Your Guide to Lowering Cholesterol with Therapeutic Lifestyle Changes. <http://www.nhlbi.nih.gov/>

**American Heart Association - High Cholesterol:** This website provides information about cholesterol including why cholesterol matters; understanding your risk for cholesterol; symptoms, diagnosis, and monitoring of cholesterol; prevention and treatment of cholesterol; and cholesterol tools and resources. [http://www.heart.org/HEARTORG/Conditions/Cholesterol/Cholesterol\\_UCM\\_001089\\_SubHomePage.jsp#](http://www.heart.org/HEARTORG/Conditions/Cholesterol/Cholesterol_UCM_001089_SubHomePage.jsp#)

**American Heart Association - High Blood Pressure:** This website provides information about high blood pressure (HBP); why HBP matters; your risk for HBP; symptoms, diagnosis, and monitoring of HBP; and prevention and treatment of HBP. [http://www.heart.org/HEARTORG/Conditions/HighBloodPressure/High-Blood-Pressure-or-Hypertension\\_UCM\\_002020\\_SubHomePage.jsp](http://www.heart.org/HEARTORG/Conditions/HighBloodPressure/High-Blood-Pressure-or-Hypertension_UCM_002020_SubHomePage.jsp)

**Stanford Patient Education Research Center:** The Chronic Disease Self-Management Program is a two-and-a-half hour workshop given once a week, for six weeks, in community or worksite settings such as senior centers, churches, libraries, and hospitals. People with different chronic health problems, such as high blood pressure or cholesterol, can attend together. Workshops are facilitated by two trained leaders, one or both of whom are non-health professionals living with a chronic disease themselves. Each participant in the workshop receives a copy of the companion book, *Living a Healthy Life with Chronic Conditions*, 3rd Edition, and an audio relaxation resource, *Time for Healing*. Employers can access this program through the Stanford School of Medicine for their employees. <http://www.patienteducation.stanford.edu/programs/cdsmp.html>

**Diabetes At Work:** This easy-to-use website helps companies to assess their need for diabetes education at the worksite. Users can download more than 30 lesson plans and fact sheets resources that can be used to inform employees about how to best manage their diabetes while at work and how to reduce their risk of further complications. This site was developed by the National Diabetes Education Program's (a joint CDC/NIH program) Business Health Strategy Workgroup for top-level managers, occupational health providers, benefits and human resources managers, and employees. <https://www.cdc.gov/diabetes/diabetesatwork/lesson-plans/index.html>

**The National Diabetes Education Program (NDEP):** NDEP is a partnership of the National Institutes of Health, the Centers for Disease Control and Prevention, and more than 200 public and private organizations. NDEP translates the latest science and spreads the word that diabetes is serious, common and costly, yet controllable and, for type 2, preventable. The resources do not have a copyright so may be co-branded. <http://www.ndep.nih.gov/>

### Job Satisfaction and Emotional Well-Being

**NIOSH Stress...At Work:** This publication highlights knowledge about the causes of stress at work and outlines steps that can be taken to prevent job stress. <http://www.cdc.gov/niosh/topics/stress/>

## Resources (continued)

### Job Satisfaction and Emotional Well-Being (continued)

**The Changing Organization of Work and the Safety and Health of Working People:** This report presents a comprehensive research agenda to investigate and reduce occupational safety and health risks associated with the changing organization of work. <http://www.cdc.gov/niosh/docs/2002-116/pdfs/2002-116.pdf>

**The USA Perspective:** Current Issues and Trends in the Management of Work Stress: This article provides a United States perspective on emergent issues in work stress and current efforts to reduce stress at work. <http://www.oecd.org/eco/growth/relationship%20education%20and%20obesity.pdf>

**Exposure to Stress:** Occupational Hazards in Hospitals: The brochure can be used to identify the sources of stress, identify the adverse health effects of occupational stress and recommend work practices to reduce occupational stress. <http://www.readcube.com/articles/10.1080/00050060310001707157>

**Workplaces That Thrive - A Resource for Creating Mental Health-Friendly Work Environments:** The Substance Abuse and Mental Health Services Administration (SAMHSA) has developed this resource to help human resources professionals understand the benefits and design of a mental health-friendly workplace. <https://www.taadas.s3.amazonaws.com/files/aab0a14aaa29ea9ff8bc98b64a2ecab3-A%20Mental%20Health%20Friendly%20Workplace.pdf>

**Depression Cost Calculator:** This calculator provides employers with estimates of the productivity impacts and medical cost of depression and avoidable costs per employee per month. <http://depression.beaconhealthoptions.com/why/cost-calculator/>

**CDC Total Worker Health:** This resource provides a strategy integrating occupational safety and health protection with health promotion to prevent worker injury and illness and advance health and well-being. <http://www.cdc.gov/niosh/twh/>

### Worksite Wellness Policies and Programs for a Diverse Workforce

**Eliminating Racial and Ethnic Health Disparities - A Business Case Update for Employers:** This brief issued by the National Business Group on Health provides information on key causes of health disparities in the U.S. and its workforce and what steps employers can take to address these disparities. [http://www.minorityhealth.hhs.gov/Assets/pdf/checked/1/Eliminating\\_Racial\\_Ethnic\\_Health\\_Disparities\\_A\\_Business\\_Case\\_Update\\_for\\_Employers.pdf](http://www.minorityhealth.hhs.gov/Assets/pdf/checked/1/Eliminating_Racial_Ethnic_Health_Disparities_A_Business_Case_Update_for_Employers.pdf)

**An Employer's Guide to Reducing Racial & Ethnic Health Disparities in the Workplace:** This guide was designed by the National Business Group on Health to help employers increase awareness of health disparities in the workplace and develop a strategy to reduce employee health disparities. <https://www.businessgrouphealth.org/pub/f3132f8e-2354-d714-5171-7cff693fe1ff>

### Organizational Support for Worksite Wellness Programs

**The NCCDPHP Workplace Health Promotion Toolkit Planning/Workplace Governance Module:** This website describes organizational strategies that provide the infrastructure to ensure program objectives are achieved, employee health risks are appropriately managed, and the company's resources are used responsibly. It includes information on leadership support, wellness council or committees, health improvement action plans, dedicated resources, communications, and data. <http://www.cdc.gov/workplacehealthpromotion/planning/index.html>

**CDC Workplace Health Promotion - Workplace Health Assessment:** This website provides guidelines, tools, and resources for conducting a workplace health assessment. <http://www.cdc.gov/workplacehealthpromotion/model/index.html>

**NCI Making Health Communications Programs Work:** A planning guide developed by the National Cancer Institute with participation from the CDC on all aspects of effective communication of health information. <http://www.cancer.gov/publications/health-communication/pink-book.pdf>

## APPENDIX 3

### Resources (continued)

#### Promoting Workplace Safety and Fall Prevention

**Occupational Safety and Health Administration Small Business Handbook:** This handbook was produced by the Occupational Safety and Health Administration (OSHA), an agency of the U.S. Department of Labor. It provides owners, proprietors, and managers of small businesses with tools to improve workplace safety. <https://www.osha.gov/Publications/smallbusiness/small-business.html>

**Slips, Trips, and Falls:** Website developed by Texas State Office of Risk Management to provide information and tips to reduce slips, trips, and falls in the workplace. <https://www.sorm.state.tx.us/office-safety/slipstripsfalls>

**Fall Protection:** Website developed by the Occupational Safety and Health Administration to provide useful, up-to-date information on fall protection. <https://www.osha.gov/SLTC/fallprotection/>

**Injury and Illness Prevention Programs:** A White Paper developed by the Occupational Safety and Health Administration to promote workplace health and safety prevention programs. <https://www.osha.gov/dsg/topics/safetyhealth/OSHAwhite-paper-january2012sm.pdf>

**Workplace Safety:** Website developed by Kaiser Permanente which strives to eliminate the causes of work-related injuries and illnesses. <http://www.lmpartnership.org/workplace-safety>

**Older Employees in the Workplace:** A brief issued by Centers for Disease Control and Prevention, National Healthy Worksite Program, highlighting an increase in the number of older adults in the workplace and best practices for maintaining older employees' health and safety. [http://www.cdc.gov/workplacehealthpromotion/tools-resources/pdfs/issue\\_brief\\_no\\_1\\_older\\_employees\\_in\\_the\\_workplace\\_7-12-2012\\_final508.pdf](http://www.cdc.gov/workplacehealthpromotion/tools-resources/pdfs/issue_brief_no_1_older_employees_in_the_workplace_7-12-2012_final508.pdf)

**Fall Prevention Among Seniors and People with Disabilities:** Website sponsored by the County of San Diego, Health & Human Services Agency that provides steps to prevent falls among older adults. <http://www.sandiegofallprevention.org/>

**San Diego County Senior Falls Report:** A report developed by the County of San Diego, Health & Human Services Agency to increase awareness about falls and the devastating impacts of falls in San Diego County for residents aged 65 years and older. [http://www.sandiegocounty.gov/hhsa/programs/phs/documents/CHS-SeniorFallsReport\\_2012.pdf](http://www.sandiegocounty.gov/hhsa/programs/phs/documents/CHS-SeniorFallsReport_2012.pdf)

#### Employee Financial Stress Management

**Hands on Banking:** Available in both Spanish and English, and provides basic financial and money management skills. The program consists of fun, accessible, self-paced online courses, downloadable instructor guides and other valuable resources. <http://www.handsonbanking.com/en/>

**MoneyWi\$e:** MoneyWi\$e, a national financial education partnership of Consumer Action and Capital One, combines free, multilingual financial education materials, curricula and teaching aids with regional meetings and roundtables to train community-based organization staff so that consumers at all income levels and walks of life can be reached. <http://www.money-wise.org/>

**MyMoney.gov:** MyMoney.gov is the U.S. government's website dedicated to teaching all Americans the basics about financial education. Whether you are buying a home, balancing your checkbook or investing in your 401(k), the resources on MyMoney.gov can help you maximize your financial decisions. <http://www.mymoney.gov/Pages/default.aspx>

**Earned Income Tax Credit (EITC):** A refundable tax credit for low- to moderate-income working individuals and couples. The amount of EITC benefit depends on a recipient's income and number of children. The EITC program in San Diego is offered through a number of agencies and focuses on serving new clients with free tax preparation services and offers assistance to returning EITC clients that are willing to learn how to prepare their own returns with free/low-cost online self-service tax websites at: [http://www.sandiegocounty.gov/content/sdc/hhsa/programs/sd/community\\_action\\_partnership/earned\\_income\\_tax\\_credit.html](http://www.sandiegocounty.gov/content/sdc/hhsa/programs/sd/community_action_partnership/earned_income_tax_credit.html)

## Resources (continued)

### Additional National Resources

**National Healthy Worksite Program [NHWP] - Centers for Disease Control and Prevention:** The National Healthy Worksite Program seeks to promote good health through prevention, reduce chronic illness and disability, and improve productivity outcomes that contribute to employers' competitiveness. NHWP hosts a LinkedIn Group for professionals seeking to connect through social media and offers a free quarterly newsletter. The National Health Worksite Program also includes a pilot program that included sites around the country; one of the sites chosen was Kern, CA. <http://www.cdc.gov/nationalhealthyworksite/index.html>

**Promoting Better Health While Controlling Costs - US Chamber of Commerce:** A simple, step-by-step guide to setting up a worksite wellness program and practical ideas for workplace wellness activities. <https://www.uschamber.com/issues/health-care/workplace-wellness>

**Healthier Worksite Initiative - Centers for Disease Control and Prevention:** Program design information, sample policies, toolkits, and other resources to help businesses of all sizes implement wellness activities in the workplace. <http://www.cdc.gov/nccdphp/dnpao/hwi/index.htm>

**Small Business Resource Guide - Centers for Disease Control and Prevention:** A guide designed to help small business owners and managers deal with occupational safety and health concerns. Given the challenges faced by small businesses, such as limited personnel and finances, this guide provides a starting point for addressing a broad range of occupational safety and health issues without a major investment of time or money. <http://www.cdc.gov/niosh/topics/smbus/guide/>

**The Affordable Care Act and Wellness Programs:** U.S. Department of Labor Outlines final rules on employee-based wellness programs. <https://www.federalregister.gov/documents/2013/06/03/2013-12916/incentives-for-nondiscriminatory-wellness-programs-in-group-health-plans>

**The Business Case for Well-Being - Gallup Business Journal:** This article describes the elements of well-being and why employee well-being is good for business. <http://www.gallup.com/businessjournal/139373/business-case-wellbeing.aspx>

### Additional California Resources

**The Nutrition Education Obesity Prevention Branch - Worksite Program:** This program is a public health initiative led by the California Department of Public Health. Its purpose is to empower low-income workers to consume the recommended amount of fruits and vegetables and enjoy physical activity every day. The website contains numerous links and resources including a Checklist to assess current practices and programs, *Fit Tips for Business*, and the *California Fit Business Kit* which provides tools to develop a worksite culture and environment that supports healthy eating and physical activity among employees. <https://www.cdph.ca.gov/Programs/CCDPHP/DCDIC/NEOPB/Pages/Worksite.aspx>

**Health, Equity, and the Bottom Line - Workplace Wellness and California Small Businesses:** This article explores the potential implementation of workplace wellness programs in California's small businesses, particularly those owned and operated by people of color, and provide recommendations for policy, research, and outreach efforts. <http://www.preventioninstitute.org/component/jlibrary/article/id-330/127.html>

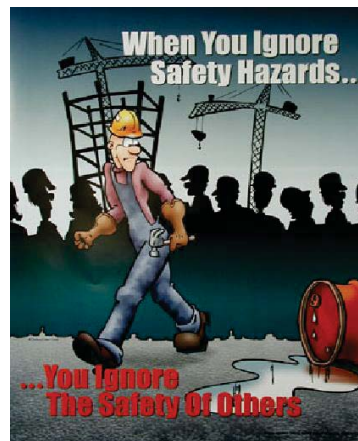
# Sample Hazards in the Workplace Training



## SAFETY FIRST

Protecting ourselves and our co-workers from workplace hazards is everyone's responsibility.

In this WSSH training we will identify examples of *Safety and Health Hazards* you may encounter while at work; and provide tips to protect yourself against them.



## Sample Hazards in the Workplace Training *(continued)*

### SAFETY HAZARDS



- **Accidents**

These safety hazards are unsafe conditions that can cause injury, illness or death. They are the most common and most visible in the workplace.
- **Biological**

Organisms or substances produced by organisms that threaten our health and safety. These hazards are associated most often with working with animals or infectious plant materials, or in hospital and laboratories.
- **Chemical**

Exposure to this hazard in form of vapors, gasses, mists, dusts, fumes or smoke may cause grave harm to our health and safety.



### ACCIDENTS

Things to look out for:

- ❖ Spills on floors, blocked aisles, or cords running across the floor that can cause trips or falls.
- ❖ Working from heights on roofs, scaffolding, or platforms (or on ladders).
- ❖ Electrical hazards include frayed cables, or improper wiring.
- ❖ Unguarded or improper use of equipment with moving parts or machinery.





## Sample Hazards in the Workplace Training *(continued)*

### BIOLOGICAL HAZARDS

Common types may include:

- Bacteria/viruses
- Poisonous plants
- Insect bites
- Fungi/Molds
- Blood and other bodily fluids
- Human or Animal waste
- Cytotoxic substances

These hazards enter your body by way of:

- Breathing (inhalation)
- Swallowing (ingestion)
- Skin (absorption)
- Cuts (injection)



### CHEMICAL HAZARDS

Beware of:

- Liquids like cleaning products, paints, acids and solvents that are not labeled!
- Vapors and fumes from welding
- Gases like acetylene, propane, carbon monoxide and helium
- Flammable material
- Pesticides

Harm caused depends on:

- Strength, or potency of the agent.
- Amount of the agent that is present.
- How long you are exposed to the agent.
- Part of you body that is exposed.



# Sample Hazards in the Workplace Training *(continued)*

## HEALTH HAZARDS

- **Physical**  
A hazard that causes bodily harm to a worker by way of physical contact with an object or equipment or physical location.
- **Ergonomics**  
A hazard of working under the conditions of strain on your body resulting in feeling of sore muscles or serious long-term injury.
- **Psychological**  
These are hazards that cause distress. It may be mental distress or physical strain. A newer hazard classification, nonetheless, important and critical to identify and control.



## PHYSICAL HEALTH HAZARDS

### Environment conditions:

Working in a poorly designed work area, uneven surfaces, overhead hazards, blocked walkways and temperature extremes.

### Physical energy sources:

Repetition of movement, force of movement and awkward or sustained postures. Also considered here is radiation, high exposure to sunlight/ultraviolet rays, and constant loud noise.



## Sample Hazards in the Workplace Training *(continued)*

### ERGONOMICS

The most difficult hazards to identify because they don't always appear immediately. The effects are shown over time. However, ergonomic hazards should be taken seriously.

Decrease your chances of injury by:

- It is important to adjust improperly positioned workstations and chairs
- Decrease frequent lifting
- Correct your posture
- Do not use too much force
- Use your workspace as your personal gym (exercises to follow)



### OFFICE EXERCISES

#### Stretches for Wrists and Arms

- Extend arm in front, palm up.
- Grab fingers with other hand.
- Gently pull hand down to stretch forearm.
- Repeat on other side.



# Sample Hazards in the Workplace Training *(continued)*

### Back Twist

- Sit upright in chair.
- Place arm behind hip.
- Twist in that direction and hold.
- Repeat on other side.



11

### Leg Extension

- Sit in chair, abs in.
- Extend leg till level with hip. Hold.
- Repeat on other side.



12

## Sample Hazards in the Workplace Training *(continued)*

### Abs - Side Bends

- Sit on edge of chair,
- Hold water bottle with both hands.
- Stretch up over the head, arms straight.
- Bend towards the left, contracting abs.
- Come back to center and repeat to right.
- Complete 10 reps.



13

## PSYCHOLOGICAL HAZARDS

Taking care of your mental health is as important as taking care of your physical health.

The key is defining when the following psychological hazards are negatively effecting your stress level:

- |                             |                    |
|-----------------------------|--------------------|
| ✓ Work pace                 | ✓ Poor leadership  |
| ✓ Over/ under worked        | ✓ Lack of respect  |
| ✓ Violence in the workplace | ✓ Social relations |
| ✓ Fatigue                   | ✓ No procedures    |
| ✓ Client/patient aggression | ✓ Working alone    |
| ✓ Bullying and harassment   |                    |

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# Sample Hazards in the Workplace Training *(continued)*

### TIPS TO PREVENT....

- Clean up your work space. Do not depend on someone else who may be coming in on the next shift.
- Report all Chemical and Biological hazards to your supervisor immediately.
- Avoid accidents due to sleep deprivation by getting plenty of rest.
- Be aware of your state of mind and recognize the stressors that may be affecting your health.
- Put the cell phone out of reach while doing work needing your focus or while driving.



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Thank you for helping keep us all safe!



16



## Sample Spot the Hazard Worksheet



### Spot the Hazard

Do Your Part to Keep Our Workplace Safe

The Spot the Hazard program is aimed at maximizing [YOUR COMPANY NAME] resources to eliminate small and obvious workplace hazards that cause hundreds of needless injuries to employees each year. A safe workplace benefits everyone and your awareness matters.

Fill out this form if you spot a safety risk or have safety suggestions.

**Describe the location of the hazard**

(include building number, room number, or other identifier):

**Describe the hazard:**

**Tell what action you took to eliminate or correct the hazard:**

**Have you reported this hazard to your Supervisor?** Yes / No

Employee Name: \_\_\_\_\_

Date: \_\_\_\_\_

Employee Telephone #: \_\_\_\_\_

Employee Department: \_\_\_\_\_

Supervisor's Name: \_\_\_\_\_

E-mail the completed form to [YOUR COMPANY CONTACT].

Hazards posing an immediate danger to life or health must be reported **IMMEDIATELY** to your Supervisor, Safety Officer or Manager.

# APPENDIX 6



## Facility Safety Assessment

### HAZARD IDENTIFICATION AND CORRECTIVE ACTION PLAN

LOCATION:	DATE:	INSPECTED BY:			
Description	Comments	Yes	No	N/A	Action Taken
<b>WORKSITE INFORMATION</b>					
1. Cal-OSHA required postings displayed?					
2. Hazardous Communications and MSDS (medical safety data sheets) available?					
3. Training/Meeting Records available?					
4. Emergency information telephone #'s posted?					
5. First Aid equipment properly stocked and assessable?					
<b>HOUSEKEEPING</b>					
6. Aisles, hallways, storage rooms and closets kept in a clean and orderly manner?					
7. Floors clean, dry and free of hazard?					
8. Carpets and rugs secure and in good repair?					
9. Outside walkway and parking areas in good repair?					
10. Are electrical or telephone wires creating a tripping hazard?					
<b>STAIRWAYS, STORAGE AREAS</b>					
11. Is there adequate lighting?					
12. Are stairways clear, uncluttered and in good repair?					
13. Is emergency lighting in place and operational?					
14. Handrails/guardrails in place and operational?					
15. Hazardous containers properly stored and labeled? (old batteries, paint, etc.)					
16. Cabinets, shelves and racks secured against tipping? (those over 6 ft. tall)					
<b>EQUIPMENT, MACHINES, TOOLS</b>					
17. Equipment/machines secured and guards in place? (paper/box cutters, etc.)					
18. Equipment maintained in good mechanical condition?					
19. Fans guarded and secured from falling or tipping?					
20. Step stools and ladders safely used when needed?					
21. Protective equipment provided to employees when necessary?					
22. Are all supplies and materials safely stacked?					



# APPENDIX 6

## Facility Safety Assessment (continued)

### HAZARD IDENTIFICATION AND CORRECTIVE ACTION PLAN

LOCATION:	DATE:	INSPECTED BY:			
Description	Comments	Yes	No	N/A	Action Taken
<b>OFFICE SAFETY AND COMPUTERS</b>					
23. Are desk/file drawers closed when not in use?					
24. Sharp objects properly stored and protected? (scissors, letter openers, etc.)					
25. Are tripping hazards eliminated? (carpet, loose tiles, obstructions, etc.)					
26. Staff: Computer screens free from glare? (lighting adjustments made?)					
27. Staff: When seated are feet positioned flat on the floor?					
28. Staff: Chairs providing support to the back and arms?					
29. Staff: PC screens positioned directly in front of the employee?					
30. Staff: PC screens positioned at or slightly below eye level when seated?					
31. Staff: Keyboard positioned so key stroking can be performed in a neutral position?					
32. Staff: Mouse or trackball positioned at approximately same height as keyboard?					
<b>ELECTRICAL HAZARDS</b>					
33. Machines and equipment grounded?					
34. Extension cords in use meet County criteria?					
35. Circuits not overloaded?					
36. Outlets and plugs in good condition?					
37. Appliances have safety switches?					
38. Portable heaters and toaster ovens onsite? (must be removed from the building)					
<b>FIRE PREVENTION</b>					
39. Fire extinguishers properly located, marked and inspected?					
40. Emergency Action Plan posted?					
41. Fire escapes and exits clearly marked?					
42. Fire doors not blocked?					
43. Are sprinkler heads free from any obstructions? (must have 36" ceiling clearance)					
44. Excess combustibles and trash removed daily?					
<b>SANITATION</b>					
45. Drinking water available?					
46. Toilet and washroom facilities kept clean?					
47. Approved eating areas free from food scraps and trash?					
<b>PERSONAL PROTECTION</b>					
48. Employees aware of Site Security Plan?					
<b>CORRECTIVE ACTION NEEDED</b>					

## Sample Worksite Action Plan

Individual(s) completing the plan: \_\_\_\_\_ Date: \_\_\_\_\_

**Overall Goal:**

**Short Term Objectives:**

*(in the next 1-3 months)*

What do you want to accomplish?			
Policy/Environmental Support/Activity	Date to Be Completed	Strategies to Reach Objectives	Responsible Party

**Intermediate Objectives:**

*(in the next 3-6 months)*

What do you want to accomplish?			
Policy/Environmental Support/Activity	Date to Be Completed	Strategies to Reach Objectives	Responsible Party

**Long-Term Objectives:**

*(in the next 6-12 months)*

What do you want to accomplish?			
Policy/Environmental Support/Activity	Date to Be Completed	Strategies to Reach Objectives	Responsible Party

## Sample Worksite Action Plan *(Continued)*

Individual(s) completing the plan: \_\_\_\_\_ Date: \_\_\_\_\_

**Overall Goal:**

**Short Term Objectives:**

*(in the next 1-3 months)*

Looking at Your Efforts		
Were the Objectives Completed?	Successes/Challenges	Next Steps

**Intermediate Objectives:**

*(in the next 3-6 months)*

Looking at Your Efforts		
Were the Objectives Completed?	Successes/Challenges	Next Steps

**Long-Term Objectives:**

*(in the next 6-12 months)*

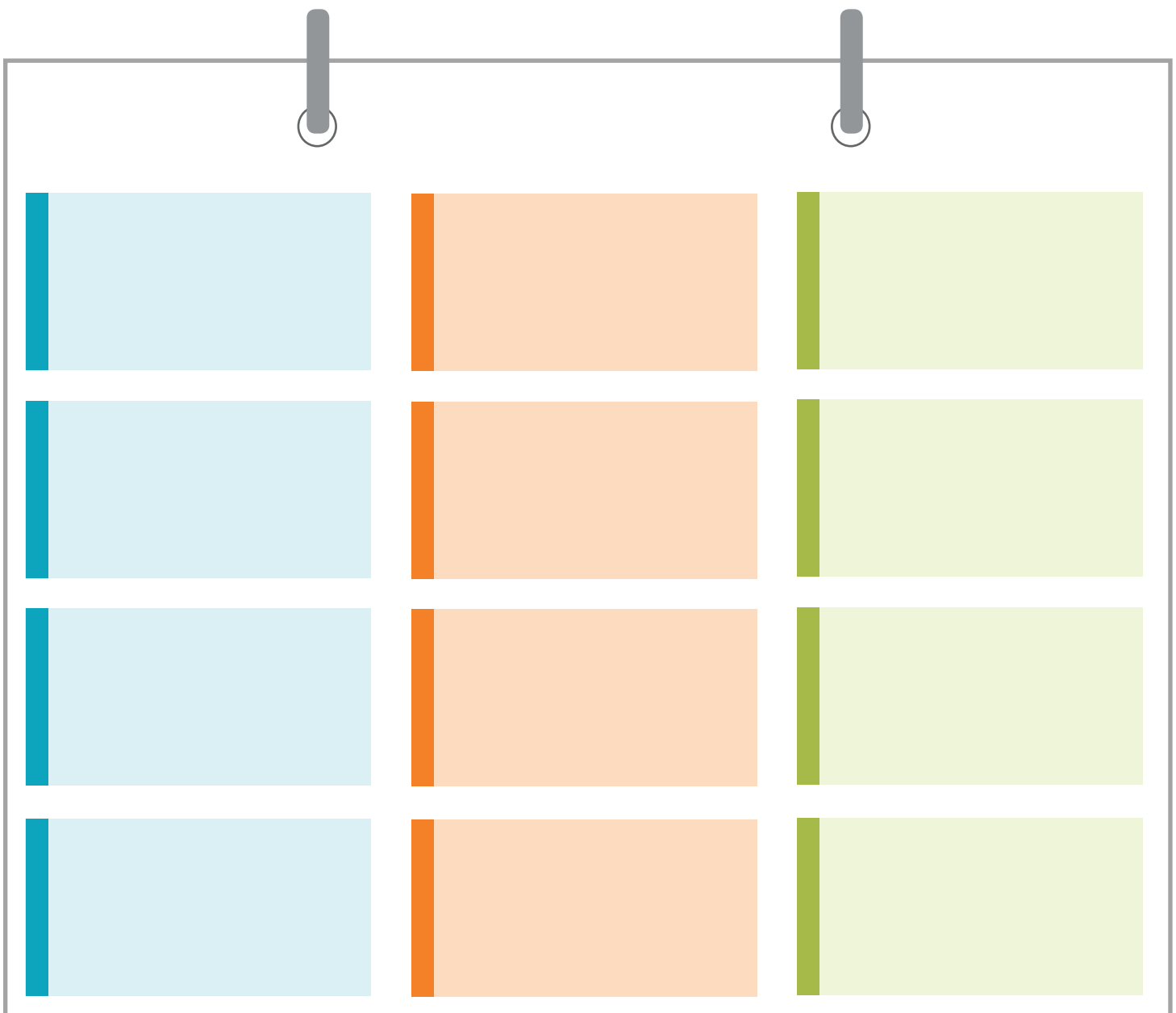
Looking at Your Efforts		
Were the Objectives Completed?	Successes/Challenges	Next Steps

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## A 12-Month Action Plan



**This 12-month Action Plan is intended to help you start or maintain a worksite wellness program at your worksite.** It is an easy to use guide. In it, you will see that each month addresses a specific health topic, with exception of December which focuses on recognizing achievements made throughout the year.



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# Promoting Health in the Workplace

Support your employees' health starting today.



## A 12-Month Action Plan



LIVE WELL  
SAN DIEGO

LIVWELLSD.ORG



SCEDC  
South County Economic  
Development Council

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# Promoting Health in the Workplace



## What is worksite wellness?

Worksite wellness involves activities that support healthy behavior in the workplace and improve the health of employees. **Worksite wellness can consist of a variety of activities such as health and nutrition education, health screenings, weight management programs, and fitness programs.** Worksites play an especially important role in improving the health of our cities and counties because more than 60% of adults are working, and many spend 2,000 or more hours a year at work.

### Did you know?

- Up to 30% of companies' yearly medical costs are spent on employees with the major heart risk factors—smoking, obesity, high blood pressure, high cholesterol, physical inactivity, and diabetes.
- A worksite wellness program can reduce sick leave by almost 27% and disability costs by more than 33%.

The good news is that there's a lot you can do to have a positive impact on your employees' health. This action plan can help. **This 12-Month Action Plan is designed to help small and medium-size businesses get started in developing their own worksite wellness program.**

Starting and/or maintaining a worksite wellness program is not difficult, and it does not have to be time-consuming or costly. **In fact, there are many simple, low- or no-cost things any employer can do to support the health of his or her employees.**

## How to use this 12-Month Action Plan

- Learn about the needs and interests of your employees.
- Choose one (or more) activity each month to promote health, wellness, and safety in your organization.
- When you complete an activity, check the box to track your progress and successes.

# Action Plan Overview



**This 12-Month Action Plan is intended to help you start or maintain a worksite wellness program at your worksite.**

- Each month addresses a specific health topic, with exception of December, which focuses on recognizing achievements made throughout the year.
- Suggested strategies and activities are also provided each month which ties into that month's health topic.
- The final page includes a brief monthly listing of health topics that are nationally recognized every month. These can help guide worksite wellness planning and implementation.
- Employees are perhaps the most valuable asset your business has. **Investing in employee health will help your employees, and your business, thrive!**

## Icon Description



Draws your attention to a tip to help support wellness efforts around that month's topic, or it provides a health fact that is important to know.

## Cultural Considerations

**Effective worksite wellness efforts take into account culture and diversity within the workplace.**

Organizations today employ people from diverse cultural backgrounds and some workers may have specific cultural needs or requirements to consider. A work environment that promotes and encourages respect for cultural differences and supports the physical and psychological well-being of its employees is more likely to result in healthier, more productive employees.

# Get Started



## Activities

Get your company ready:

- Sign up for the **LIVE WELL @ WORK** eNewsletter. Get the latest worksite wellness information delivered straight to your inbox.

Learn more:

- [UC San Diego Center for Community Health](#)

- Announce your worksite wellness initiative. Promote your program with emails, fliers, posters, and more. Brainstorm creative ways to encourage participation in worksite wellness activities and events.



Tip: Send emails about your program to your employees. It will demonstrate support and encourage their participation.

- Select a wellness champion. Choose a champion who can guide activities and work to increase participation in the program.



Tip: Look for someone who is enthusiastic, shows attention to detail, and likes to help others.

Learn more:

- [Develop a worksite wellness committee](#)

# January

Focus on: Prevention



## Strategies

- Announce a New Year's resolution at your workplace.  
Let your employees know that you're committed to supporting their health by promoting preventive services.  
  
Learn more:
  - [www.HealthyWorks.org](http://www.HealthyWorks.org)
- Encourage your employees to set New Year's health resolutions.  
Encourage your employees to share their resolutions with other staff members.
- Remind your employees to set up yearly checkups.  
Around the time of their birthday, remind employees to make check-up appointments with their doctor.



Tip: Research shows that people who share their goals are more likely to stick with them.

## Activities

- Discuss prevention at a staff meeting.
- Attach health-related fliers to employee pay stubs.
- Encourage employees to share their health success stories.

# February

Focus on: Heart Health



## Strategies

Get involved in Love Your Heart.

This one-day event offers free blood pressure screenings to the public throughout the San Diego region. Encourage your employees to “know their numbers” and take charge of their own heart health. As a business, there are several ways to get involved with Love Your Heart.

Learn more:

- [Visit www.LoveYourHeart.org](http://www.LoveYourHeart.org)

Discuss the ABCs of heart health.

Use fliers and email to encourage employees to discuss the ABCs of heart health during check-ups and preventive visits to their doctor.

The **ABCs** of heart health are:

**A**spirin therapy, **B**lood pressure levels, **C**holesterol levels, and **S**moking cessation.

Learn More:

- [ABCs from Million Hearts](#)

Sign up for the Heart at Work eNewsletter.

[Visit their website](#) to sign up for a newsletter from the American Heart Association (AHA). Each month, AHA will send you information and tips to help you create a heart-healthy workplace.

## Activities

- Communicate to your employees about the connection between unhealthy eating, lack of physical activity, and health conditions like heart disease and high blood pressure.
- Support employees’ efforts to be physically active during the work day by permitting comfortable walking shoes as part of acceptable workplace attire.

# March

Focus on: Nutrition



## Strategies

- Set up healthy vending machines.  
If you have vending machines at your workplace, work with your vendor to make sure that the food and beverage choices are healthy.

Learn more:

- [Vending Machine Food & Beverage Standards](#)

- Offer nutrition education materials to your employees.  
Provide easy-to-understand nutrition information to help employees make healthy choices.

Learn more:

- [Sharing nutrition tips with your employees](#)

- Support healthy eating by providing refrigerators, microwaves, and a space for employees to prepare nutritious food.

## Activities

- Make water readily available and encourage employees to drink it throughout the day.
- Provide an open fruit basket with a contribution box for employees to donate to keep it filled.
- Avoid having candy jars or snack jars in common spaces.

# April

Focus on: Physical Activity



## Strategies

- Start a walking club.  
Team activities can go a long way when it comes to motivating employees. Encourage your employees to get some physical activity during the workday.  
Learn more:
  - [Get help starting a walking club](#)
  - [Find more walking tips](#)
  
- Allow your employees time for physical activity.  
Create and promote a policy that allows employees to take 1 to 2 physical activity breaks during the day to walk the stairs, stretch, or do other physical activities they enjoy.  
Learn more:
  - [Example of a physical activity policy](#)
  
- Offer educational resources about physical activity.  
Give your employees an idea of how to start adding physical activity to their everyday routines.  
Learn more:
  - [Share these physical activity tips from the CDC](#)



Tip: To start out, schedule walking at least 3 days a week for 20 minutes.

## Activities

- Encourage “walk and talk” meetings.
- Allow flexible lunch schedules so employees can exercise before, during, or after lunch.
- Include a short stretch break for meetings lasting longer than one hour.

# May

Focus on: Behavioral Health and Wellness



## Strategies

- Emphasize the importance of self-care for mental wellness. Encourage employees to seek out and utilize resources that support mental wellness.

Learn more:

- [It's Up to Us](#), the County of San Diego's mental health wellness website, offers 10 tips for living a full, enjoyable life

- Promote an alcohol- and drug-free workplace.

Learn more:

- For information on creating policies, programs and environmental changes to support an alcohol- and drug-free workplace, visit <https://www.cdc.gov/workplacehealthpromotion/health-strategies/substance-misuse/interventions/programs.html>



Did you know?

Approximately 1 in 5 American adults will have a mental health condition in any given year.

*Source: Substance Abuse and Mental Health Services Administration*

## Activities

- Connect to your health insurance plans and employee assistance program resources to promote mental health wellness.
- Download the [SAMHSA Drug-Free Workplace Toolkit](#) and develop a drug-free workplace policy.
- Call SAMHSA's Workplace Helpline at 1-800-WORKPLACE (967-5752) for additional assistance to employees.

### **For Immediate Assistance:**

If you or someone you care about needs to speak to someone or is in crisis and needs immediate help, please call the **Access & Crisis Line @ 888-724-7240**.

Trained and experienced counselors are available 24 hours a day, 7 days a week to help you.



# June

Focus on: Workplace Safety and Fall Prevention



## Strategies

- Prevent Falls in the Workplace.**  
Provide a “Hazards in the Workplace” training for all employees to take and then have a follow-up discussion about the training with employees.  
Note: See “Hazards in the Workplace” sample training materials to get started in [Appendix 4](#).
  
- Implement a “Spot the Hazard” program for employees.**  
This is a safety awareness initiative to encourage employees to actively participate in timely identification and elimination of hazards in the workplace.  
It’s as easy as 1-2-3:
  1. Spot a hazard.
  2. Take action to remove the risk of injury from the hazard.
  3. Complete the “Spot the Hazard” form to detail the hazard and what was done to reduce its risk.Note: See “Spot the Hazard” sample material in [Appendix 5](#).
  
- Encourage employees to take charge of safety.**  
Offer praise and recognition to those that identify hazards and suggest solutions. A useful safety and health resource guide for small businesses is at [National Institute for Occupational Safety and Health](#).

## Activities

- Develop a written plan for emergency response to medical events at your worksite, and post it prominently.
  
- Complete a Facility Safety Assessment (see [Appendix 6](#)) to identify hazards, make a plan, and track actions taken to correct them.

# July

Focus on: Summer Health and Safety Tips



## Strategies

- Educate your employees about working safely in summer heat. Tell your employees about heat stroke and exhaustion:

Learn more:

- [How to recognize its symptoms](#)
- [Steps to avoid it](#)

- Arrange work activities that match employee's physical condition and the temperature.

## Activities

- Encourage workers to wear hats, sunscreen and lightweight clothing when working outdoors.
- Provide water and encourage employees to drink throughout the day in hot weather.
- Remind them to cool off in the shade or an air conditioned building.

# August

Focus on: Breastfeeding Support and Accommodation



## Strategies

- Confirm that you have a policy regarding breastfeeding. Remember, breastfeeding support in the workplace is healthy for your employees and their families—and, it's the law! If you don't have a policy in place, there is help available.

Learn more:

- [View a sample breastfeeding policy](#)
- [Visit www.breastfeeding.org](http://www.breastfeeding.org)

- Promote your company's breastfeeding policy to employees. Make sure employees are aware of the policy and available resources. It's especially important to communicate policy and accommodation before employees go on family leave.

## Activities

- Provide time for breastfeeding employees to pump or breastfeed while at work.
- Provide a clean, private workspace for employees to nurse or pump breast milk.
- Let your employees know about the benefits of nursing for them, their children, and your business.

# September

Focus on: Disaster Preparedness



## Strategies

- Make a plan: Be prepared for any kind of disaster.**  
The Family Disaster Plan and Personal Survival Guide was developed by the San Diego County Office of Emergency Services to help families be prepared in the event of a disaster. **The Family Disaster Plan is a template and guide that will help you prepare for and survive a disaster.**

Learn more:

- [Review a sample Family Disaster Plan](#)

- Get a Disaster Preparedness Kit.**  
Take steps to prepare for and respond to potential emergencies, including natural disasters and terrorist attacks.

Learn more:

- [Review the recommended items to include in a Basic Emergency Supply Kit](#)

## Activities

- [Register your phone for AlertSanDiego.](#)
- [Download the free SD Emergency App.](#)
- Make sure you have at least a three-day supply of food and water on hand.
- Keep important documents like insurance policies, bank records, and birth certificates in a sealed, waterproof container.

# October

Focus on: Weight Management



## Strategies

- Review the basics of weight management with your employees. Healthy weight involves healthy eating, regular physical activity, and balancing the number of calories consumed and the number the body uses.
  
- Combine physical activity and nutrition into one coordinated approach. Look for ways to combine activities and support, such as nutrition education, aerobic and strength training, goal setting, building lifestyle skills, self-help materials, and group exercise sessions.

Learn more:

- [Help employees stay in control of their weight](#)

## Activities

- Provide employees resources to assess their weight.
- Discuss the ways workers can improve their eating habits.
- Encourage employees to be more physically active during the work day (e.g., taking brisk walks before or after eating lunch).
- Make sure that healthy food and beverage options are available to employees, such as in vending machines.

# November

Focus on: Quitting Smoking



## Strategies

Make your workplace 100% tobacco-free.  
Promote policies that reduce tobacco use and non-smokers' contact with secondhand smoke at work.

Help your employees quit smoking today.  
Check with your insurance provider to learn about programs available to your employees. You can also distribute resources in your workplace to help them quit.

Update your policies prohibiting or restricting tobacco use to include all electronic smoking devices.

Learn more:

- [California Smokers' Helpline \(1-800-NO-BUTTS\)](#)
- [American Cancer Society sample policies and more](#)

## Activities

- Observe Great American Smokeout Day (3rd Thursday in November and always the Thursday before Thanksgiving).
- Recognize employees who have quit smoking or celebrate quit anniversaries.
- Make quit kits available to employees.

# December

Focus on: Financial Stress



## Strategies

- Emphasize prevention of financial problems  
Encourage employees to access money management programs that are often free or extremely low-cost.

Learn more:

- Visit [2-1-1 San Diego](#) or call 2-1-1 to connect with community resources through a free, 24/7 phone service and searchable online database.

- Encourage employees to make every dollar count.

Learn more:

- [Making Every Dollar Count](#) for tips on budgeting, setting financial goals, and more. Available online in both English and Spanish.



Did you know?

Over 3/4 of the U.S. workforce (76%) list money as a significant cause of stress.

*Source: American Psychological Association*

## Activities

- Take advantage of seasonal opportunities to share financial education resources with employees, such as during the holidays or tax season.
- Provide employees with a Sample Household Budget (see [Appendix 12](#)) so they can keep monthly expenses organized.

# Ongoing Activities

Make promoting health a priority.



## Strategies

- Stay up-to-date with available resources for your employees. Continue to collect resources that promote prevention and heart health.

Learn more:

- Check out the **LIVEWELL @ WORK** [Resource Library](#) for information, materials and tools that employers and employees can reference and distribute to create and/or enhance their organization's worksite wellness program.
- Browse the [UCSD LIVEWELL @ WORK Calendar of Events](#) for upcoming activities, events and screenings.
- Check the list of national and local awareness events and activities by month on the next page of this action plan.

- Continue to track your success. Ask your insurance provider for quarterly reports on employee usage of preventive services.



# Annual Calendar

January • Family Fit Lifestyle Month

February • Love Your Heart  
• National American Heart Month  
• Wear Red Day (Women's Heart Disease Awareness)

March • National Nutrition Month

April • Alcohol Awareness Month  
• National Walking Day  
• National Minority Health Month  
• World Health Day

May • National Physical Fitness and Sports Month  
• Global Employee Health and Fitness Month  
• American Stroke Month  
• National High Blood Pressure Education Month  
• Bike to Work Month  
• Mental Health Awareness Month  
• World No Tobacco Day

June • National CPR & AED Awareness Week  
• National Safety Month  
• Men's Health Month

July • National Minority Mental Health Month

August • National Breastfeeding Month  
• World Breastfeeding Week  
• National Immunization Awareness Month

September • San Diego Heart Walk  
• Healthy Aging® Month  
• National Cholesterol Education Month  
• Fruits and Veggies—More Matters Month  
• National Childhood Obesity Awareness Month  
• World Heart Day

October • Health Literacy Month  
• National Health Education Week

November • National Eating Healthy Day  
• Great American Smokeout  
• American Diabetes Month  
• Lung Cancer Awareness Month  
• National Family Health History Day

December • National Influenza Vaccination Week

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## Wellness Strategies Checklist



Yes	No	Nutrition	
		1	Create and communicate Healthier Food & Beverage Policies (for cafeterias, contracted services, snack bars, vending machines, meetings, events, etc.).
		2	Hold Lunch and Learns (fun and informative healthy eating seminars). Secure a guest presenter and promote the seminar to all of the organization's employees.
		3	Provide Healthy Vending Machines. A refrigerated unit could expand the number of healthful options. Plan a promotion of the healthy items.
		4	Make water readily available and promote drinking water throughout the day.
		5	Support employees who wish to "brown-bag" healthy food from home by providing refrigerators, microwaves, and a space for food preparation.
		6	Provide an open fruit basket with a contribution box for employees to donate money to keep it filled.
		7	Avoid having candy jars or other unhealthy food jars on employees' desks, in conference rooms, copy rooms, or waiting rooms.
		8	Include healthy options when celebrating birthdays (if done on a regular basis).
		9	Coordinate a group to buy shares in a Community Supported Agriculture (CSA) farm.
		10	Conduct campaigns around specific healthy food topics/groups using multiple channels (e.g., email messages, brochures, videos, pamphlets, newsletters, bulletin boards, posters) and have a very simple message.
		11	Replace unhealthy food advertisements, posters, and materials (e.g., junk food and soda) with non-branded health promotion signs, such as physical activity and healthy eating posters.
		12	Offer nutritious food and beverages at meetings, banquets, coffee stations, events, etc.
		13	Provide information that addresses the risks of overweight or obesity, diabetes, high cholesterol, and high blood pressure.
		14	Highlight employees that make healthy food choices.
Yes	No	Lactation	
		1	Provide time for breastfeeding employees to pump or breastfeed at work.
		2	Provide a clean, private workspace, easily accessible, private, non-restroom space for employees to nurse or pump breast milk.
		3	Develop and communicate a policy for employees who are breastfeeding to work out a lactation schedule that allows reasonable break time for them to express milk during the work day.
		4	Promote community-based programs and resources as needed.
		5	Provide health messages communicating the link between supportive maternal care practices and the benefits for the employee, child, and business.

## Wellness Strategies Checklist *(Continued)*

Yes	No	<b>Alcohol and Other Drug Use (AOD)</b>	
		1	Establish and communicate clear policies specific to substance misuse or abuse.
		2	Provide flexible scheduling for employees engaged in self-care activities that support substance abuse support and recovery (e.g., AA, NA, AlAnon).
		3	Provide and/or promote AOD prevention-related resources to reduce driving while intoxicated or drugged and to encourage safe disposal of unused prescription medicines. (See <a href="http://www.sdsheriff.net/prescription-drugs/dropbox.html">http://www.sdsheriff.net/prescription-drugs/dropbox.html</a> or contact local police departments for locations.)
		4	Encourage utilization of AOD-related resources provided by employer health plans and Employee Assistance Programs.
Yes	No	<b>Physical Activity</b>	
		1	Ask local gyms/workout facilities if they will offer a discount for your employees.
		2	Start walking groups or clubs (before, during, or after work).
		3	Encourage stair climbing and/or hold a stair-climbing competition. Post signage and reminders to help encourage the behavior. Put interesting posters and artwork in the stairwells. Make stairwells safer, cleaner, well-lit, and accessible.
		4	Bike Racks: install bike racks in a safe place.
		5	Fitting In Physical Activity: for meetings longer than one hour, include a 5-10 minute stretch break.
		6	Intramural Sports Teams: sponsor intramural sports teams at the worksite (e.g., softball, volleyball, bowling).
		7	Allow for "walk and talk" meetings.
Yes	No	<b>Tobacco</b>	
		1	Have "quit smoking" resources available at the worksite for employees.
		2	Don't sell tobacco products onsite.
		3	Promote the free and effective, statewide tobacco quitting helpline.
		4	Highlight successful quit attempts.
		5	Establish and communicate tobacco-free policies. Make all areas of the worksite property smoke-free (indoor and outdoor). Actively enforce a written policy prohibiting and/or restricting the use of tobacco products. Clearly display "no smoking" signs with information about the tobacco-free policy.
Yes	No	<b>Health Screening and Preventive Services</b>	
		1	Promote and educate employees about the value of clinical preventive services and health screenings.
		2	Encourage employee flu vaccinations annually. Consider on-site immunizations. Cross-promote related programs such as medical self-care for cold/flu and handwashing signage in restrooms.

## Wellness Strategies Checklist *(Continued)*

Yes	No	<b>Emergency Response and Safety</b>	
		1	Take steps to prevent injuries and illness, actively investigate and address safety problems, and provide support and follow-up in an expedient manner.
		2	Enforce safety rules: involve employees in developing a safety program so they gain ownership. Seek input and suggestions about existing work hazards. Be sensitive to literacy issues (reading and language barriers).
		3	Recognize individuals and teams that demonstrate safe behaviors.
		4	Have a written plan for emergency response to medical events at facility.
		5	Offer access to a nationally recognized training course on Cardiopulmonary Resuscitation (CPR) that includes Automated External Defibrillator (AED) training.
		6	Identify location of AEDs with posters, signs, markers, or other methods.
Yes	No	<b>Disease Management</b>	
		1	Promote community-based programs and resources as needed.
		2	Provide information and resources related to asthma, cancer, high cholesterol, high blood pressure, diabetes, heart disease, stroke, etc.
		3	Offer incentives for participating in disease management programs.
		4	Provide health insurance coverage with no or low out-of-pocket costs for cholesterol, lipid, blood pressure, and diabetes medications and supplies.
Yes	No	<b>Mental Health/Stress Management</b>	
		1	Promote mental health and stress management resources: offer employees materials that address subjects such as depression, substance abuse, and stress.
		2	Provide training for managers on identifying and reducing workplace stress-related issues (e.g., training on performance reviews, communication, personnel management, assertiveness, time management, or conflict resolution).
		3	Routinely provide information about community-based mental health programs.
		4	Ensure workplace is ergonomically suitable for all employees.
		5	Provide an Employee Assistance Program (EAP) offering information, support, consultation, and referrals to employees.
Yes	No	<b>Other Wellness Topics</b>	
		1	Promote community health efforts (e.g., fun-runs/5Ks, health fairs, and educational seminars) and invite family members when possible.
		2	Organize support groups to encourage employees in their healthy lifestyle changes.
		3	Provide small incentives for employees that display healthy behaviors.
		4	Provide regular wellness communication: place healthy messages in high traffic areas and tailor them to your workforce. Consider your employees' languages, cultures, literacy levels, and readiness to change their health behaviors.

## Healthy Hints for Employees



✓	Healthy Hints for Employees Checklist
	Stand up and take a break from your computer every 30 minutes. Stretch.
	Take breaks in sitting time during long meetings.
	Stand to greet a visitor at your workplace.
	Use headsets or the speaker phone during teleconferences so you can stand or walk.
	Drink more water (going to the water cooler will also break time from sitting). Staying well hydrated helps you think more clearly, improves your mood, and reduces mindless snacking.
	Use a height-adjustable desk so you can work standing or sitting.
	Have standing or walking meetings.
	Walk to give a message to a co-worker. Walk to a co-worker's desk instead of emailing or calling him/her.
	Eat your lunch away from your desk. Treat yourself well. When it's time to eat, give yourself a real break. Stop working, stop rushing, and give yourself a few minutes to savor what you are eating.
	Take a leisurely walk after eating your lunch.
	Take the stairs whenever you can.
	Take the long route to the restroom.
	Go to the gym during your lunch time.
	Replace your office chair with a stability ball; it will strengthen your abdominal muscles.
	Pack food and beverages for the week ahead. An hour spent on Sunday getting organized will save time and money all week long. Wash fruit, bag vegetables, slice cheese, and fill water bottles for the week ahead.
	Stock up on nutrition. Fill your desk drawers, office fridge, and briefcase with a healthy variety of tasty snacks and quick meals like instant oatmeal, trail mix, and certain microwaveable entrees.
	Pack lunch while you cook dinner. Cook once and eat twice. When you cook, make an extra serving or two and pack your lunch as you clean up the evening meal.
	Add nutrition to your commute. Pack your favorite healthy snacks for the car, bus, or train.
	Pump up with protein power. For long-lasting brain and body power, add some protein with foods such as nuts, seeds, soy nuts, yogurt, milk, jerky, and nutrition bars.
	Tempted by the cookie jar or candy dish? Switch to a fresh fruit bowl or jar filled with different, delicious dried fruits like mango, pineapple, apricots, plums, and raisins.

## Sample Meet Well Pledge



### *Meet Well Pledge* Chronic Disease and Health Equity (CDHE) Unit

The Chronic Disease and Health Equity (CDHE) Unit of the County of San Diego Health & Human Services Agency promotes healthy lifestyles through *Live Well San Diego: Healthy Works*, an initiative of *Live Well San Diego*. *Live Well San Diego: Healthy Works* unifies opportunities that create environments that support healthy food choices, regular physical activity, and tobacco-free environments. To that end, CDHE is committed to matching its internal day-to-day operations and workplace environment to CDHE program goals and aspirations for the communities we serve. By adhering to the Meet Well Pledge, CDHE can truly begin to build better health and promote a culture of wellness among our staff.

The strong relationship between diet and health, and the increasing rates of obesity, make supporting healthy food choices at work part of our commitment to better health. The Pledge intends to assist CDHE staff in modeling healthy choices, especially for food and beverages purchased for all internal and external meetings, trainings, and events. The *Meet Well Pledge* does not dictate what individual staff members eat or bring into the office for personal consumption.

***Meet Well Pledge:* CDHE will support healthy workplace environments, environmental sustainability, and aim to create a social norm making the healthy choice the easy one.**

#### Food & Beverage:

- Provide access to water and avoid individual-portion plastic bottles.
- Provide healthy beverages, (e.g., non-sugar sweetened beverages, non-fat/low-fat milk, and non-dairy beverages to include soy/almond/rice.)
- Always offer at least one plant-based or vegetarian entree, and consider eliminating animal protein as an option.
- Offer whole grain items.
- Offer healthier (low-fat, low-sodium) condiments and dressings, and provide them on the side.
- Consider minimally processed, nutrient dense, vegan, low-sodium, and gluten-free options.
- Offer reasonable portion sizes, appropriately-sized serve ware, and use bulk (not individual) containers for all beverages whenever possible.
- Avoid foods containing saturated and trans-fats, (partially) hydrogenated oils, high-sodium, and high-caloric desserts.

#### Environmental Sustainability:

- Strive to conduct zero-waste meetings.
- Provide and/or encourage attendees to bring reusable food and beverage containers/serve ware.
- Use locally-sourced and sustainably-produced food and giveaways, when possible.
- Reduce waste and packaging, whenever possible. Do not provide or use Styrofoam products.
- Provide recycling bins, and compostable food scrap bins, when possible.
- Provide electronic documents ahead of meeting, and display on-screen to reduce the need for paper copies. If needed, paper copies should be printed double-sided and in black and white.
- Encourage carpooling to reduce pollution and greenhouse gas emissions.

#### Physical Activity:

- Periodically break up sitting time (no more than 90 minutes without a stretch or physical activity break).
- Encourage walking meetings.
- Choose meeting locations that are close to public transit and promote the use of transit.

#### Tobacco:

- Provide a tobacco-free environment at all times, including at the entrances of buildings.
- Choose to host meetings/trainings/events in a venue and/or city with a comprehensive smoke-free policy that includes restaurants and bars.
- Remove tobacco products, promotional items, and advertisements from meeting materials and events.

# APPENDIX 12



## Sample Household Budget

These are sample income and expense items to support employees' understanding of how to live within a budget that works best for them. If the difference between total monthly income expenses is a positive number, good work! You're spending less than you're earning. If it's a negative number, you should consider ways to save or reprioritize.

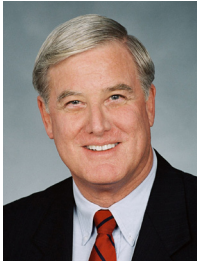
<b>PART 1: MONTHLY INCOME</b>	<b>Estimated</b>	<b>Actual</b>
Person #1: List monthly income for all full- and part-time jobs	\$2,000.00	\$3,000.00
Person #2: List monthly income for all full- and part-time jobs	\$1,000.00	\$1,000.00
Person #1: Unemployment Insurance (if applicable)	\$0.00	\$0.00
Person #2: Unemployment Insurance (if applicable)	\$0.00	\$0.00
Other: Child Support	\$0.00	\$0.00
Other: Tax Credits	\$0.00	\$0.00
Other: Incoming rent for rental property	\$1,000.00	\$1,000.00
Other: Any other income you would like to track	\$500.00	\$500.00
<b>TOTALS</b>	<b>\$4,500.00</b>	<b>\$5,500.00</b>
<b>PART 2: MONTHLY EXPENSES</b>	<b>Estimated</b>	<b>Actual</b>
Mortgage/Rent	\$1,500.00	\$1,500.00
Home Equity Loan/Line of Credit	\$0.00	\$0.00
Home Insurance	\$25.00	\$25.00
Credit Card #1	\$100.00	\$100.00
Credit Card #2	\$75.00	\$75.00
Credit Card #3	\$45.00	\$45.00
Credit Card #4 (add as many as you need to)	\$25.00	\$25.00
Car Payment	\$200.00	\$200.00
Car Insurance	\$65.00	\$65.00
Parking	\$50.00	\$50.00
Tolls	\$80.00	\$80.00
Gasoline	\$60.00	\$120.00
Subway	\$0.00	\$0.00
Health Insurance	\$45.00	\$45.00
Cable/Satellite TV	\$55.00	\$55.00
Internet Access	\$60.00	\$60.00
Household Phone Bill (landline, if applicable)	\$0.00	\$0.00
Mobile Phone Bill(s)	\$35.00	\$95.00
Daycare/Babysitting/Eldercare	\$0.00	\$45.00
Groceries	\$100.00	\$210.00
Pet Care	\$0.00	\$20.00
Gym Membership	\$0.00	\$0.00
Heating Bill	\$25.00	\$25.00
Electric Bill	\$50.00	\$80.00
Water Bill	\$25.00	\$30.00
Lawn Care	\$0.00	\$0.00
Unplanned: Vet Bill		\$250.00
Unplanned: Dinner Party		\$70.00
Unplanned: Car Repairs		\$2,050.00
Unplanned: Parking Ticket		\$75.00
Unplanned: Dishwasher Repair		\$450.00
Unplanned: Other		\$0.00
<b>TOTALS</b>	<b>\$2,620.00</b>	<b>\$5,845.00</b>
<b>PART 3: RESULTS (from Parts 1 and 2)</b>	<b>Estimated</b>	<b>Actual</b>
<b>TOTAL MONTHLY INCOME</b>	<b>\$4,500.00</b>	<b>\$5,500.00</b>
<b>TOTAL MONTHLY EXPENSES</b>	<b>\$2,620.00</b>	<b>\$5,845.00</b>
<b>VARIANCE (this is how much over or under budget you are)</b>	<b>\$1,880.00</b>	<b>(-\$345.00)</b>



## DON'T FORGET TO TELL US WHAT YOU THINK!

Now that you've reviewed the toolkit, let us know how you intend to use it by completing an online feedback tool. Visit: [www.LiveWellISD.org/LWatW-Feedback](http://www.LiveWellISD.org/LWatW-Feedback)

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