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## **Developing a Corporate Strategy for Fitness and Health Promotion Tri Fit's Eight Step Approach**

As organizations today continue to compete in the global economy, cost containment strategies will be increasingly important. Controlling the rising cost of employee ill health is becoming a priority for corporate leaders. The emerging corporate culture in Canada is one which has an employee population centered in health, safety and wellness.

Developing a corporate strategy for health promotion and disability management makes good business sense. Tri Fit's eight-step process ensures a strategic, integrated, needs-driven and results-oriented approach.

The following process works best in organizations with strong leadership and a long-term commitment to employee health.

### **1. Identify Your Program Champion**

This person should be a leader in your organization and a strong advocate of health. Typically this is an individual who actively pursues his or her own personal quest for optimal health.

The program champion must have the resources and authority to drive the program forward. The program champion's key role is to ensure the strategic plan for health is aligned with the organization's business objectives, strategic focus and organizational values. For example if the organization promotes that "our strength is our people" the wellness program must demonstrate how initiatives will nurture and protect that valuable resource.

### **2. Form Your Health Promotion Strategy Team**

The Health Promotion Strategy Team should include decision makers and stakeholders from areas of the company that can influence health and the company's bottom line. These areas may include; finance, human resources, training and development, health services, compensation and benefits, employee assistance services (EAP), marketing, facilities, health and safety, rehabilitation, cafeteria or food services and the union. A team of six to eight representatives is recommended.

The role of the Strategy Team is to develop and implement the strategic plan, look for opportunities to promote health, ensure the program is integrated into key areas of the organization, streamline efforts, maximize company resources and program evaluation.

### **3. Complete an Organizational Health Audit**



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The purpose of Tri Fit's Organizational Health Audit is to evaluate your existing programs and services, physical environment and policies & procedures that support health. It is also important to look at your organizational culture or "how things are done" around the company.

Members of the Strategy Team complete the Audit independently and then meet to discuss their evaluation. During the evaluation process, health issues and opportunities are discussed in preparation for the development of the strategic plan.

#### **4. Analyze Your Organization's Cost Pressures**

Cost pressures are identified by analyzing a number of areas including; benefit costs, Workplace Safety Insurance Board (WSIB) claims, drug usage, type of paramedic claims, absenteeism data and EAP utilization. This process helps to target areas that can be positively impacted by a health promotion program and to provide a baseline for evaluating change.

#### **5. Conduct a Health Risk Appraisal or Employee Needs & Interest Survey**

The next step is to determine your employee's health risks, interests and readiness to change. A confidential health risk appraisal can accomplish many goals. It provides a baseline from which to measure personal lifestyle changes, provides employees with relevant health information, motivates employees to take charge of their health and assists in program planning. Most health risk appraisals provide individual reports and a corporate report identifying high-risk areas in the company.

Many organizations prefer to administer customized needs and interest survey to evaluate employee needs. The benefit of this approach is that the company is able to gather information on the employees' perceived wellness needs and program interests. This information can be incorporated into the strategic plan. Administering a survey also has the added benefit of fostering a sense of employee ownership to the program.

#### **6. Develop Your Strategic Plan for Health Promotion**

The strategic plan should incorporate information collected from the *Organizational Health Audit*, your organization's cost pressures, and health risk appraisal data or employee survey results. The strategic plan should include your program mission, three or four objectives and several initiatives under each objective. The strategic plan provides a framework to encourage, support and evaluate "best health practices." It is also important that the plan align itself with the vision, goals and objectives of the organization.

The sample strategic plan that follows was developed for blue jeans maker Levi Strauss & Co. (Canada) Inc. Levi Strauss & Co.'s mission statement and aspirations



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(how employees interact with each other in a business environment) guided the development of the plan.

Levi Strauss & Co.'s aspirations include the following statement: *Above all, we want satisfaction from accomplishments and friendships, balanced personal and professional lives, and to have fun in our endeavors.* The wellness program plan included a number of components to ensure that it embraced this statement including the following:

1. A vision statement, which tied in with the company's aspirations.
2. An incentive system to encourage and reward the accomplishment of healthy milestones.
3. A recognition system to applaud success.
4. Friendly competitions between Levi Strauss & Co. locations to ensure a fun environment.
5. Opportunities to participate in small group educational programs to foster team support.
6. Initiation of support groups for employees completing wellness programs (i.e. smoking control support group).
7. Programs dealing with work and family balance.

Other information that was analyzed and used to develop the plan included:

1. Company demographics
2. Focus groups
3. Cultural audit
4. Top drug report
5. EAP utilization
6. Employee benefit services report
7. Health and dental claims
8. Operational performance summaries
9. Health risk appraisals

## **7. Prepare a Business Case to Support Your Plan**

Your business case for health promotion provides the necessary details for approval at the senior management level. The business case includes:

1. The Strategic Plan for Health
2. A proposed program budget
3. Marketing strategies
4. Program leadership options
5. An implementation plan
6. Evaluation methodology.



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In presenting the strategic plan it is important to highlight how the plan aligns itself with the strategic direction of the organization.

The program budget should include educational resources, marketing costs, rewards and incentives, leadership costs and supplies.

Marketing strategies should address how the program will be promoted and rolled out to various groups within the organization i.e. decentralized locations, high risk employees, older employees.

Program leadership should address how volunteers will be used, internal resources and whether consultants have been proposed. All play an equally important role in the implementation of your wellness program.

The program implementation plan should incorporate the following types of programs that help create awareness of positive health practices, assist employees in making lifestyle changes and initiatives, which support long-term change.

*Awareness programs* create an awareness of the importance of healthy lifestyle practices and motivate employees to take the next step. Examples of awareness programs include posting educational posters, newsletter articles and lunch and learn seminars.

*Lifestyle change programs* are more comprehensive and longer in duration. They are designed to assist employees in changing behavior. Examples of lifestyle change programs are nutrition education programs, stress management programs, back care classes and smoking control programs.

*A supportive corporate environment* encompasses everything from corporate policies & procedures, the physical environment and creating a corporate culture that supports good health practices. Follow-up sessions and support groups for employees who have completed 6-10 week wellness programs also provide a supportive environment for long-term change.

Evaluating the effectiveness of health promotion is ongoing. A formal evaluation should be conducted annually and may include; re-administering steps three to five, program participation statistics and a year end survey to revisit “soft” issues such as morale, program satisfaction and future program direction.

## **8. Solicit Input and Communicate Your Plan**



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Employee input is critical to the long-term success of your program. An Employee Advisory Committee should be formed to roll out the plan. Another key responsibility of this team is to solicit feedback from all levels of the organization to ensure buy-in.

Front line Manager's Information Sessions and focus groups are also important. This group needs to buy-in to the notion that they play a key role in supporting positive health practices. Regular meetings are advised with front line managers to receive ongoing input, address issues and orient new managers.

### **Conclusions**

The World Health Organization's definition of health is "a state of complete physical, mental and social well-being and not merely the absence of disease and infirmity." In order for us to create healthy workplaces, wellness initiatives must have a program champion, have employee ownership, be management supported, results driven and strategically aligned with the overall business objectives of the organization.

Wellness initiative that embrace these qualities will have a positive impact on an organization's bottom line. Canadian research points to many case studies where on-site programs have resulted in decreased absenteeism, lower claims and increased productivity.

Organizations who have embraced wellness as part of "how they do business" have one thing in common. They demonstrate a commitment to their most valuable resource – their people. They understand the increased pressures associated with downsized organizations, a rapidly changing workplace, an aging work force and the challenge of balancing work and family obligations. And they share a common belief that healthy employees are happier, absent less and more productive.

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