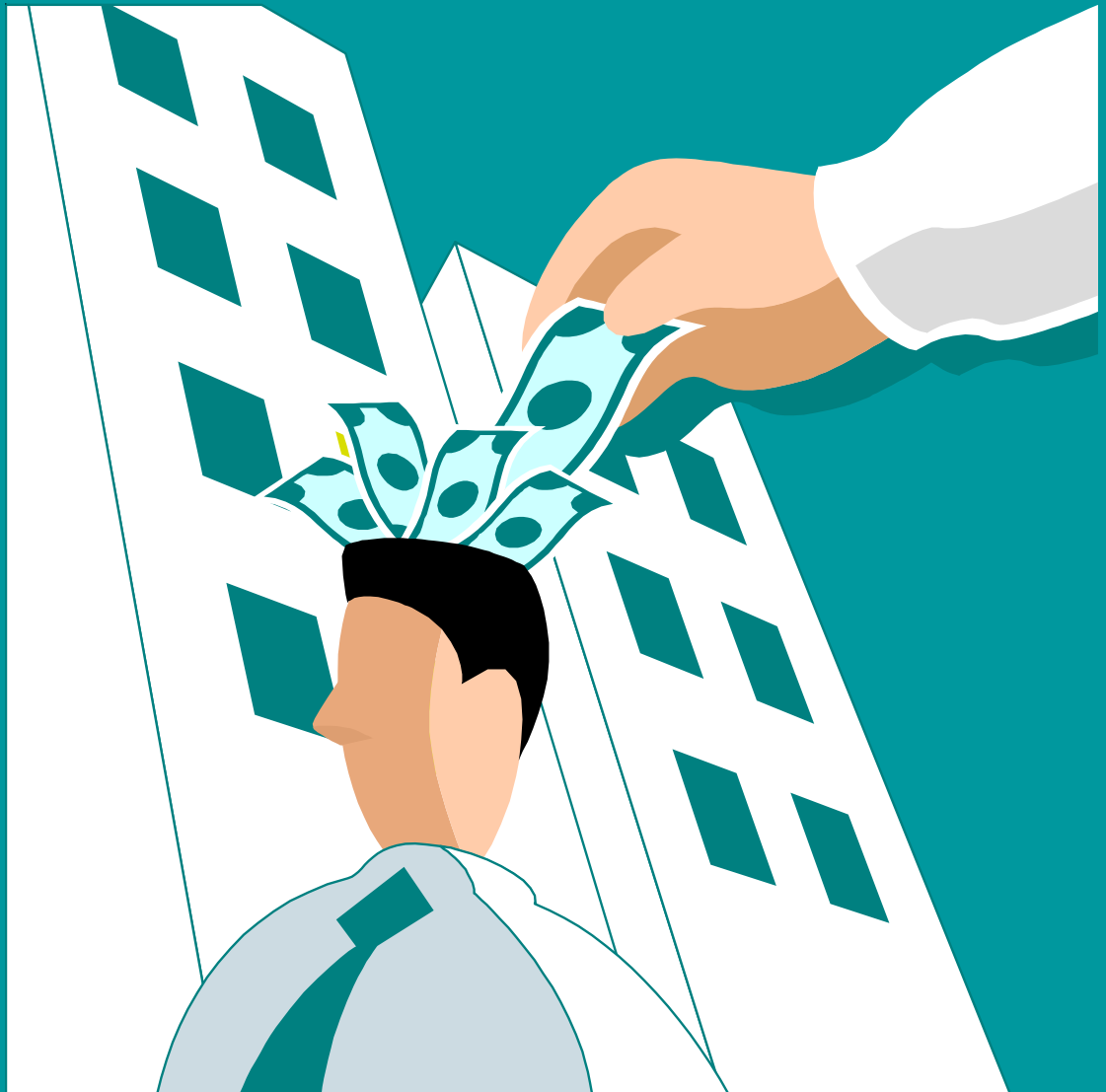


# *WELLNESS PAYS:*

## *Promoting Workplace Wellness in Small Businesses*



Published by the Small Business Wellness Initiative through a grant from the Substance Abuse & Mental Health Services Administration

# *Wellness Pays: Promoting Workplace Wellness in Small Businesses*

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## ***ABSTRACT***

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***Wellness Pays: Promoting Workplace Wellness in Small Businesses*** is based on the experiences of the [Small Business Wellness Initiative](#), a community collaborative project funded by a grant from the Substance Abuse & Mental Health Services Administration (SAMHSA). The mission of the Small Business Wellness Initiative is to enhance the health, productivity and quality of work life for small business leaders, their employees and their communities.

The Small Business Wellness Initiative, piloted in Tarrant, Dallas and Denton counties in North Texas over a three-year period, has proven to be a successful method for promoting wellness, reducing substance abuse risk factors and reaching those most in need of health promotion services—small business owners, employees and their families. The initiative synthesized four innovative elements: (1) science-to-service functionality; (2) cross-agency collaboration for community-based service; (3) web-based technology transfer; and (4) low-cost options for the much underserved small business community. To our knowledge, the Small Business Wellness Initiative is the first community-collaborative project in the nation to use a science-to-service model for small businesses.

Community collaborators involved in the Small Business Wellness Initiative were [Tarrant Council on Alcoholism & Drug Abuse](#), a nonprofit agency located in Tarrant County with a mission to reduce drug and alcohol abuse in the community; [Organizational Wellness & Learning Systems](#), a research and consulting firm founded by Joel Bennett, Ph.D. that specializes in employee well-being, organizational health and workplace culture; and the [North Texas Small Business Development Center](#), a partnership program of the U.S. Small Business Administration and Dallas County Community College District that provides counseling, seminars and information in starting and maintaining a small business.

One of the primary goals of the Small Business Wellness Initiative was to develop a strategic and aggressive community outreach model that could be used by other organizations throughout the nation to implement a complementary or similar wellness initiative. We developed this replication manual to provide guidance to organizations like yours.

### ***How to Use This Manual***

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This manual will serve as a guide to help you promote and implement a small business wellness initiative in your community. This manual is not intended to be a set of required steps, but rather, a tool for strategizing and implementing a successful wellness initiative. Do not feel limited to the information or suggestions provided in this manual. We encourage you to customize the program to fit the needs of your community.

Before you decide to embark on a wellness initiative for small businesses, it is important to know some of the obstacles and challenges. It is also important to know where some of our successes were and how we achieved them. Throughout this manual, you will find italicized references to specific areas of our project. These references will give you additional information or examples on how our project was implemented.

You will also find additional resources in the back of this manual. Please feel free to contact us for technical assistance or for train-the-trainer workshops. We would be happy to assist you in planning and carrying out a similar wellness initiative in your area.

## ***ACKNOWLEDGEMENTS***

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### **Small Business Wellness Initiative Team:**

Kelly Heath, Project Director  
Joel B. Bennett, Ph.D., Principal Investigator  
Camille Patterson, Ph.D., Research Coordinator  
Beth Mivedor, Training Coordinator  
Roxanne Martinez, Marketing Coordinator

We also wish to acknowledge the following for their assistance in development of the Small Business Wellness Initiative: Darlene Beard, Erin Kelley, Renee Lovett, Stephani Mullins, Maria Rojas, Richard Sledz, Wyndy Wiitala and Michael Shields.

### **Community Collaborators:**

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(817) 332-6329  
[www.tarrantcouncil.org](http://www.tarrantcouncil.org)

*Organizational Wellness & Learning Systems*  
4413 Overton Terrace Court  
Fort Worth, Texas, 76109  
(817) 921-4260  
[www.organizationalwellness.com](http://www.organizationalwellness.com)

*North Texas Small Business Development Center  
Technology Assistance Center*  
Bill J. Priest Institute for Economic Development  
1402 Corinth Street, Suite 1520, Dallas, Texas 75215  
(214) 860-5709  
[www.ntsfdc.org](http://www.ntsfdc.org)

The Small Business Wellness Initiative would also like to thank the Substance Abuse & Mental Health Services Administration for funding this project. For additional information on SAMHSA, visit [www.samhsa.gov](http://www.samhsa.gov).

## INTRODUCTION

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Studies suggest that for every \$1 invested in wellness, a company saves \$3 to \$5 in health and safety costs. Businesses that invest in employee health and wellness reap the financial rewards through savings on healthcare costs, disability pay, absenteeism, turnover and safety problems.

Workplaces have already proven to be a great place to promote wellness. After all, people spend more time at work than doing anything else. Eighty-two percent of the U.S. population is linked in some way to a worksite. Therefore, providing health programs is a great way to reach a substantial number of people in your area.

## Workplace Wellness in Small Businesses

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Unlike large corporations, small businesses often lack the resources to provide workplace wellness and health promotion programs to their employees. However, they may be the most in need of such services. Small businesses are the hardest hit by health insurance costs and have the highest rates of substance abuse. Employee well-being and physical or mental illness can also be more disruptive in a small business environment. Workplace wellness in small businesses also makes sense because small firms employ the majority of working citizens.



Regardless of the size of a business, workplace wellness programs can pay. Statistically, even if there are only 100 people in a company:

- 60 sit all day to do their work
- 50 don't wear their safety belts regularly
- 50 feel they're under moderate stress
- 35 are overweight by 20% or more
- 30 smoke
- 27 have cardiovascular disease
- 25 or more have high cholesterol (over 200 mg/dl)
- 10 are heavy drinkers
- 10 have high blood pressure
- 5 have diagnosed diabetes and another 5 have undiagnosed diabetes
- 7 use marijuana
- 1 uses cocaine

## Bottom Line Benefits

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At least one quarter of the health care costs incurred by working adults can be attributed to modifiable health risks (e.g., diet, exercise, tobacco use, etc.) Fortunately, there is a way to hold back the trend. Growing research links an individual's lifestyle behaviors to their health risk.



The good news is worksite wellness programs can:

- Reduce health care costs
- Decrease workers' compensation claims
- Decrease employee absenteeism
- Increase worker productivity
- Improve employee morale

The bottom line is that workplace wellness programs can benefit any size business—small or large.

## STARTING WELL

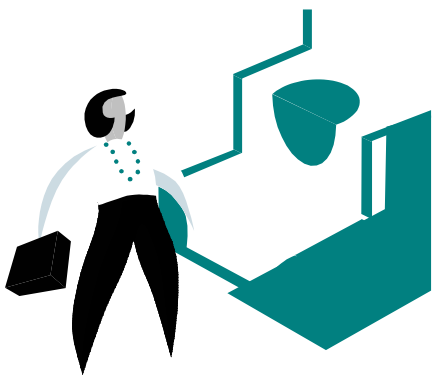
One of the first steps in implementing any program or initiative is to determine your goals and objectives before you get started.

### Setting Goals and Objectives

A goal is a broad statement of purpose. Goals describe the desired long-term impacts of what you want to accomplish. Goals also allow you to know precisely when it is you can declare victory. Therefore, goals should be given careful consideration, as they will be the landmarks toward which you will direct your programming efforts. Goals can be tailored to meet the specific needs of your target population.

Objectives build on goals. Objectives are the specific changes expected in your target population as a result of your program. Your objectives should provide detailed information, including the months, dates, and times when you will offer the program.

*The primary goals of the Small Business Wellness Initiative are to:*



- *Provide prevention programs to high-risk small businesses, which typically do not have access to such programs, and encounter many barriers to implementation*
- *Determine the effectiveness of these programs, as well as those factors within small business settings that facilitate or diminish effectiveness*
- *Develop a strategic and aggressive outreach model by coordinating efforts of a nonprofit and community-based substance abuse resources center, a regional small business development center (SBDC), and a small research firm*
- *Develop a “Path of Assistance” service model that will provide regional SBDCs with resources to deliver prevention/health promotion programs to small businesses through local small business assistance centers*
- *Create a network of small businesses and provide an avenue to unite small business owners and community organizations interested in the wellness of the small business community*

Developing goals and objectives can be a challenging task and will demand a concerted effort on the part of your team. It is important that staff, prospective partners and funding agencies, as well as your target participants, understand the goals of and objectives of your initiative.

Some questions to ask yourself when developing goals and objectives include:

- Do the goals/objectives reflect your mission statement and purpose?
- Do the goals/objectives reflect the anticipated outcomes for the initiative?
- Do the goals/objectives provide a basis for evaluating the success of the initiative?

To be successful, your goals and objectives should be specific, measurable and realistic.

**Specific**-Goals and objectives that are specific may include dates and/or number of anticipated participants. A specific goal or objective can help evaluate the success of your program.

**Measurable**-Be sure to set a goal or objective that can be measured. If you can measure your goal or objective, you will know exactly when you have achieved it.

**Realistic**-It is important to set a realistic goal or objective that you can achieve. Don't set yourself or your initiative up for failure by creating unrealistic goals or objectives.

## STARTING WELL

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### Goals and Objectives Worksheet

**What are the goals of your initiative?**

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**What are the objectives of your initiative?**

Write each objective below. Then check whether or not it is specific, measurable and realistic.

| <b>Objectives</b>   | <b>Specific</b> | <b>Measurable</b> | <b>Realistic</b> |
|---|-----------------|-------------------|------------------|
| <i>Example: Recruit 12 small businesses to participate in a workplace wellness program by end of Year 1</i> | Y or N          | Y or N            | Y or N           |
|   |                 |                   |                  |
|   |                 |                   |                  |
|   |                 |                   |                  |
|   |                 |                   |                  |

**What are your desired outcomes?**

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**What tools will be used to measure or evaluate the success of your initiative?**

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## ***STARTING WELL***

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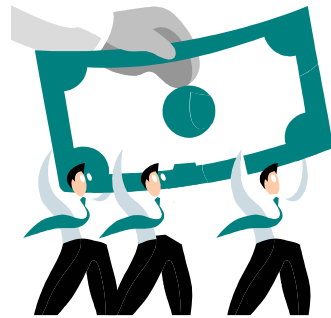
Evidence suggests that community collaborations are critical to building public awareness of an issue. Community collaborations can pay off in more ways than one.

### **Building Collaborations**

Collaborating with other organizations or agencies not only help maximize your available resources, professional expertise and outreach efforts, but it can also increase your impact, build credibility and enhance your chances of success.

However, when you decide to collaborate with other organizations, remember that not just any partners will do. While the possibilities for collaboration are endless, you should consider selecting partners who share your mission or have similar goals. Potential collaborators could be your local chamber of commerce, a nonprofit organization or a local wellness firm. There are hundreds of organizations looking to collaborate with health promotion and wellness advocates. Your city or county public health departments are another possibility. A list of possible prevention partners can also be found online at: [www.preventionpartners.samhsa.gov](http://www.preventionpartners.samhsa.gov).

*The Small Business Wellness Initiative was designed as a community collaboration between local prevention centers, small business development centers and wellness professionals. In our initiative, these constituencies were represented by:*



- *Tarrant Council on Alcoholism & Drug Abuse, a local nonprofit agency with a drug-free workplace division and a mission to reduce drug and alcohol abuse in the community*
- *Organizational Wellness & Learning Systems, a private research/consulting firm that offers customized health promotion programs in the workplace and community*
- *North Texas Small Business Development Center, Technology Assistance, a regional center that offers counseling and drug-free workplace programs to small businesses*

*Together, collaborators maximized available resources, professional expertise and outreach efforts.*

You may decide that building a wellness coalition could be a beneficial way to meet your goals and objectives. Community Anti-Drug Coalitions of America (CADCA) offers a free technical assistance bulletin on coalition building. Visit CADCA at: [www.cadca.org](http://www.cadca.org).

Keep in mind that collaboration can often be challenging, and conflict is inevitable in any group process with high stakes. Conflict resolution and consensus-building skills are often the keys to successful collaboration. Building trust is also essential. Other keys to building consensus:

- Relationship building and trust take time so have periodic discussions where partners can share grievances and praise.
- Organize around a common purpose and make the agenda reflect that purpose.
- Circulate materials well in advance so that partners can review them, and circulate summaries promptly after meetings.
- Finally, don't forget to celebrate successes. This is essential to building a team.



## ***STARTING WELL***

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### **Collaboration Worksheet**

**Develop a list of organizations, agencies or community leaders that share your mission or goals.**

Write them down below:

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**Develop a list of organizations or agencies that may complement your program.**

Write them down below:

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**Develop a list of organizations or agencies that have a stake in this issue.**

Write them down below:

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#### **Things to consider when collaborating:**

After you have developed a list of potential collaborators, consider such questions as:

- Do they have special skills, authority or knowledge to assist the collaboration?
- In what way would the collaborator benefit from the initiative?
- Is there a history of communication and cooperation with the collaborator?
- Does each collaborator have sufficient time, staffing, resources and/or funding to commit to collaborative activities?
- Do the collaborators reflect the diversity of the community and/or target population?
- Does each collaborator view health, wellness and/or substance abuse as part of their mission?

Finally, determine which organizations, agencies or leaders you will invite to collaborate on the initiative. You may also decide to invite additional collaborators at a later time.

## STARTING WELL

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Although a wellness initiative may not require enormous resources, some investment will be necessary in order for it to be effective.

### Funding Your Initiative

Your wellness initiative may require outside funding to get off the ground. Before you begin seeking outside funding for your initiative, there are a number of strategies to consider, including pooling or sharing funds with collaborators and reorganizing existing resources. It is a good idea to meet with your collaborators to determine what resources are currently available and take an inventory of resources that may already exist.



*The Small Business Wellness Initiative utilized existing office space at each of the partners' primary locations to house initiative staff. In addition, the initiative utilized free conference space through local business assistance centers and other community organizations for community outreach efforts. A great example of pooling and using existing resources was identifying access to Employee Assistance Program (EAP) services. Through our partnership with the Small Business Development Center, the initiative was able to offer free EAP services to participating businesses for a limited time period.*

One other thing to do before seeking outside funding for your initiative is to develop an itemized budget. Your budget should detail your investment by providing accurate and realistic information concerning the amount of money it will take to achieve your desired outcomes. Budget expenses may include, but are not limited to, the following:

- **Equipment:** this includes any equipment or tools used to implement your program. (i.e. projector, laptop, screen, printer)
- **Supplies:** these costs include any items needed for carrying out your initiative. (i.e. flipcharts, pens, folders, paper)
- **Training Costs:** this includes costs specifically associated with training delivery. (i.e. staff time, training manuals, travel expenses)
- **Marketing:** these costs cover all promotional and collateral materials used to promote your initiative. (i.e. brochures, incentives, printing)

While many different types of funding sources exist, they are not always easy to find. It is best to pursue multiple funding streams at once. Some funding sources that organizations may pursue include:

- **Grants:** funds provided either through government (city, county, state or federal) or through private foundations that often require an application, proposal and evaluation reports
- **Sponsorships:** funds that help pay for a program or initiative, in exchange for recognition as a sponsor on all promotional items
- **Gifts:** *in-kind* donations or other contributions solicited from corporations or organizations

When exploring funding sources for your initiative, it may be good to start with your local and state agencies. Nonprofit service centers may also be available to assist in finding possible funding sources.

*The Small Business Wellness Initiative was funded by a grant from the Center on Substance Abuse Prevention (CSAP) through the Substance Abuse & Mental Health Services Administration (SAMHSA).*

Grants.gov also allows organizations to electronically find and apply for competitive grant opportunities from all federal grant-making agencies. The web site also provides an overview on developing and writing a grant proposal. To begin searching for grants, visit [www.grants.gov](http://www.grants.gov).

**STARTING WELL**

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**Funding Worksheet**

**Develop an inventory of existing resources and/or funds available.** List all resources below:

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**Develop an anticipated budget.** List itemized expenses and project costs below:

| <b>Item/Activity</b>                       | <b>Projected Cost</b> |
|--|-----------------------|
| <i>Example: Office Supplies-Flipcharts</i> | \$200                 |
|  |                       |
|  |                       |
|  |                       |
|  |                       |
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**Develop a list of possible funding sources or agencies.** Be sure to research various types of funding sources and find out what types of projects they fund.

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## STARTING WELL

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A plan is a roadmap for your activities that will facilitate systematic implementation of a program.

### Mapping Your Plan

Although planning sometimes takes time away from program activities, it is important to have an ongoing planning document that specifies who will do what, when, where and how. Good planning can improve implementation of your initiative, which in turn, can lead to improved outcomes. Just like a “to do” list is used to organize tasks, your planning document can provide a straightforward method to implementing your initiative.



Your planning document can also help guide you into the right direction toward your goals and objectives. Reviewing your plan often can help you and your initiative to stay on track.

Your planning document can also include each partner’s roles and responsibilities. Once you have selected your collaborators and have taken an inventory of resources, it is important to sit down as a team and clearly define each partner’s roles and responsibilities and develop an organizational structure for your initiative. Structure your initiative in a manner that best fits your community needs.

Once your roles and responsibilities are established, it will be easier to view what things need to be done and by whom. A timeline of all program activities, including recruitment and outreach, should also be included in your plan. Develop a timeline that works best for your initiative and share it with each partner. Your timeline of activities should be as specific as possible and updated frequently. Your timeline and planning document should be reviewed at initiative meetings to determine whether the team is on track.

*The Small Business Wellness Initiative team developed a strategic plan and utilized Microsoft Project software to develop timelines for the outreach, implementation and research process. We identified four foundational strategies that helped inform how we would approach the five primary goals.*

### Sample Timeline

| Date       | Activity/Action   |
|------------|---|
| April 2002 | Host focus group retreat with local small business owners, members of local Chambers of Commerce and initiative staff members |
| April 2002 | Develop marketing and recruitment materials; actively begin recruiting businesses through mailings, cold calling and events   |
| June 2002  | Begin field work with recruited businesses; conduct needs assessment  |
| July 2002  | Continue field work with participating businesses; begin training delivery  |

## STARTING WELL

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### Planning Worksheet

**Develop a list of roles and responsibilities for staff and partners.** Be sure to consider each role that might be involved in implementing your project, including recruitment, retention and training delivery. Be as specific as possible.

| <b>Position</b>                          | <b>Roles and Responsibilities</b>  |
|--|--|
| <i>Example:<br/>Training Coordinator</i> | <i>Prepare training presentations, coordinate scheduling and delivery of training programs in businesses, conduct field work</i> |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**Develop a timeline for the implementation of your initiative.** Be sure to allocate sufficient time to each activity involved in your project, including recruitment, retention and training delivery.

| <b>Date</b>               | <b>Activity/Action</b>                            |
|---------------------------|---|
| <i>Example: June 2005</i> | <i>Begin field work with recruited businesses</i> |
|                           |   |
|                           |   |
|                           |   |
|                           |   |
|                           |   |
|                           |   |
|                           |   |
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|                           |   |

## ***STARTING WELL***

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### **Congratulations!**

We hope that you have been successful in laying the foundation for your wellness initiative. By this point, you should have:

- **Outlined your goals and objectives**
- **Identified potential collaborators**
- **Found and secured funding sources**
- **Mapped your plan and timeline**

Once you have completed all of the above, it is time to put your plan into action. Hopefully, you have found that you are one step closer to fulfilling some of your initial goals and objectives.

Now, you are ready to move on to ***Marketing Well*** section that will address:

- **Defining your target**
- **Reaching small businesses**
- **Utilizing media messages**
- **Small business selling points**

The following section will assist you in reaching your target audience and recruiting businesses to participate in your initiative.

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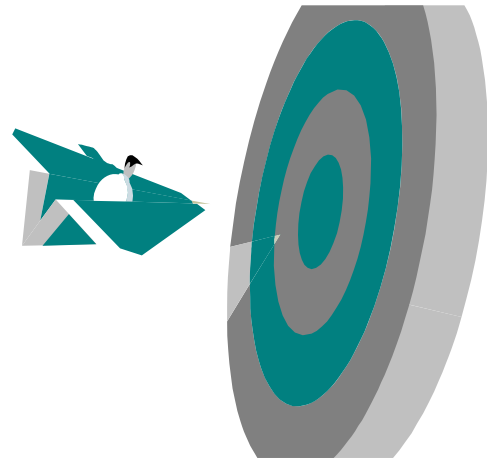
## MARKETING WELL

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One way to effectively market your initiative to your target population is to know precisely whom you are trying to reach.

### Defining Your Target

While your wellness initiative may target the small business community, there may be thousands of small businesses in your region. It is imperative that you create a specific list that clearly defines the types of businesses that you intend to reach through your initiative. This list will help you later in determining the best strategies to actually reach the target businesses.



It may be helpful to brainstorm and determine the type of businesses that you would like to recruit to participate in your initiative. Consider the following questions:

- What types of businesses are most in *need* of your program or services?
- What types of businesses would *want* your program or services?
- How could certain types of businesses benefit from your program or services?
- How many of the above types of businesses exist in your region or area?

Be as specific as possible, including specific geographic location, industry and number of employees. It is also worth considering target demographics within those businesses. Some employers may employ a majority of young or older workers, while some businesses are predominantly female or male. Consider all factors when narrowing down your target audience.

*The Small Business Wellness Initiative targeted small businesses in a tri-county region of North Texas. The initiative targeted employers with enough employees to assess program effectiveness. Therefore, participating businesses ranged in size, from 8 to 500 employees. The initiative also targeted businesses in certain high-risk industries, including the construction, transportation and service industries.*

After you have developed a detailed target list, think about who the contacts would be at those establishments. Consider the following questions:

- Who in the organization would have regular contact with all employees?
- Who in the organization is responsible for human resources functions?
- Who in the organization would most recognize the value of your program or services?
- Who in the organization would advocate for your initiative?
- Who in the organization is responsible for employee training or development?
- Who in the organization is responsible for employee benefits and healthcare?

It is important to note that, often times in small businesses, one individual may be responsible for multiple functions. Therefore, employee health and wellness may not always be their top priority within the organization. It may also be worth noting that some smaller, local franchises or offices may need to obtain corporate office approval before participating in any company-wide initiative.

*The Small Business Wellness Initiative targeted small business owners, team supervisors, human resources staff and training/safety coordinators within the targeted industries. The initiative sought opportunities to network with those individuals and to introduce and promote them to our programs and services.*

## MARKETING WELL

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While there are many ways to recruit small businesses to participate in your initiative, one of the greatest challenges is learning which way will work best for your project.

### Reaching Small Businesses

Some recruitment methods tend to be more effective than others and can sometimes depend on your target audience. The following are some examples of outreach methods that can be used to recruit small businesses to participate in your wellness initiative:

- **Small Business Centers**-Small business development centers, business assistance centers and small business councils exist in many regions of the nation. These centers or councils often conduct training and offer counseling to small businesses. Find the small business center in your area at: [www.asbdc-us.org](http://www.asbdc-us.org). Offer your programs to their clients.



*The Small Business Wellness Initiative originally contacted businesses through direct mailings and cold calls. The team found these methods to be ineffective, as most businesses had not received or read the material sent to them. The most effective recruiting came through referrals from local chambers of commerce, business development centers and other professional organizations.*

- **Networking**-Research professional organizations tailored toward your target audience. Many small businesses are involved in local networking groups. If you think your programs or services meet the needs of an organization's members, submit a workshop proposal to the organization. By providing a free workshop or seminar, you may be able to recruit participating businesses.
- **Events**-Conference exhibits and other events are another way to reach your target audience and deliver your message. Creativity can be your best asset when considering what will suit your exhibit (i.e. posters, photos, brochures). Create a contact card to collect visitor information at conferences and events. Participate in health fairs, trade shows and wellness conferences.

*The initiative team worked to gain partners and engage similar initiatives in the community through presentations at conferences, including a local Work/Life Balance Conference. In addition, the initiative presented to organizations, such as the Denton Chamber of Commerce and National Business Association, and delivered training directly to staff at our partner agency, the North Texas Small Business Development Center.*

- **Newsletters**-Newsletters are among the most effective tools for reaching people with a common interest. Newsletters can inform, educate and recruit participating businesses. Try submitting an article promoting wellness and your program to local newsletters that reach your target audience.
- **Incentives**-Incentives encourage participation and can range from water bottles to t-shirts. If there is no funding available for the purchase of incentives, try soliciting prizes from local merchants or organizations. Raffles are also great ways to award prizes on a limited budget.

*The Small Business Wellness Initiative awarded a \$500 Workplace Wellness Partner Award to recognize businesses with the highest percentage of participation in the project. In addition, we issued gift certificates as prizes for employee participation.*

- **Testimonials**-Having a reputable business give a testimonial about your initiative is invaluable to marketing your program to other similar businesses. After you have delivered a program to a business, be sure to ask them for feedback. Also, ask them for permission to use their testimonial in future marketing materials.



**Outreach Worksheet**

**Who is your target audience? Who are your other audiences?** Make a list of the types of businesses/industries that would *need* or *want* your program/service. Be as specific as possible.

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**Who will be your contacts at your targeted businesses?** Make a list of the possible contacts within your targeted businesses.

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**What organizations or associations cater to your target audience?** Make a list of organizations in which your target audience might be involved.

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**What would be the best way to reach your target audience?** Make a list of different methods of reaching your target businesses and contacts within those businesses.

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## **MARKETING WELL**

While the mass media is an effective tool for reaching many people at the same time, it can also be a good resource for raising awareness in a particular target audience.

### **Using Media Messages**

Your local newspapers and business journals can be a great way to reach your business community. Subscribe to and read your local publications to find out which reporters write about small business or wellness issues. Don't forget to tap into targeted industry and trade publications. Send press releases to targeted reporters and editors of your local business journals and trade publications. If your press release is newsworthy, you can get some free advertising. You may also try securing donated advertising from your local publications that support your cause.

### **Sample Press Release**

**FOR IMMEDIATE RELEASE:**      **CONTACT:**  
May 12, 2004                              Roxanne Martinez (817) 332-6329 ext. 240

#### **Businesses Benefit from Workplace Wellness National Employee Health and Fitness Day Set for May 19**

(FORT WORTH)—The **Small Business Wellness Initiative** encourages area businesses to do something beneficial for employees and for their bottom line on May 19—National Employee Health and Fitness Day.

Always the third Wednesday in May, National Employee Health and Fitness Day celebrates the importance of a healthy workplace. Studies have shown that businesses that promote wellness in the workplace not only benefit from a healthier workforce, but they also benefit from enhanced recruitment and retention of employees, improved health care costs, decreased rates of illness and injuries and reduced employee absenteeism.

“Employee health and wellness can have a significant impact on a business’ bottom line,” says SBWI project director Kelly Heath. “Workplace wellness is an avenue that any size business cannot afford to ignore.”

Whether a business has 5 or 500 employees, there are many ways to promote National Employee Health and Fitness Day. The Small Business Wellness Initiative offers several suggestions for any size business to promote health and fitness in the workplace:

- \*Host a health brown bag or lunch ‘n learn workshop
- \*Offer a stress management training or workshop
- \*Sponsor free health screenings (i.e. high blood pressure, cholesterol, glucose)
- \*Promote health and fitness in your employee newsletters or check stubs
- \*Collaborate with community organizations to offer health programs or services
- \*Implement a workplace wellness or exercise program
- \*Provide and promote an employee assistance program (EAP)
- \*Host an on-site wellness or health fair
- \*Offer smoking cessation programs to employees
- \*Support healthy choices through catering at meetings and vending machines

The Small Business Wellness Initiative offers a variety of brown bag trainings to help a business become a healthier, more productive environment. Training topics include: Active Lifestyle, Alcohol, Tobacco and Drugs, Family Connection, Healthy Eating, Managing Stress, Safety and Moderation, Team Building/Communication, Time and Presence. **For more information, contact Beth Mivedor at (817) 332-6329 ext. 258.** Businesses interested in learning how wellness programs can affect their bottom line or for additional resources on promoting health and fitness in the workplace, visit [www.sbwi.org](http://www.sbwi.org).

#### **About the Small Business Wellness Initiative**

The Small Business Wellness Initiative is a community collaborative project funded by a grant from the Department of Health and Human Services. The mission of the Small Business Wellness Initiative is to enhance the health, productivity and quality of work life for small business leaders, their employees and their communities. Community partners include Tarrant Council on Alcoholism & Drug Abuse, the North Texas Small Business Development Center and Organizational Wellness & Learning Systems.

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## MARKETING WELL

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Small businesses comprise a challenging market for wellness and health promotion programs. Before an employer will decide to offer a health or wellness program, the employer must see a payoff.

### Small Business Selling Points

Whether it be lower health insurance costs, increased productivity or improved employee morale, it is important to develop a list of selling points for your initiative and its programs. While there are many different selling points that can be derived from workplace wellness programs, the following are just a few that may inspire a small business to participate in your initiative or wellness program:

- 1) *Workplace wellness programs can help to control or reduce health insurance costs.*  
The number one concern for small businesses was health insurance costs, according to a recent study by the National Federation of Independent Business. Therefore, you must use this as a selling point to get a small business employer to participate in your initiative. There are numerous studies that have proven workplace wellness programs lower health insurance costs.
- 2) *Workplace wellness programs can increase productivity.*  
In a small business environment, an employee's health and well-being can be crucial to productivity. Employee absenteeism, illness or injury can significantly reduce the productivity of a small business. Therefore, a small business selling point is that workplace wellness programs have proven to reduce employee absenteeism and increase productivity.
- 3) *Workplace wellness programs enhance or improve employee morale.*  
Many businesses, even small businesses, want to portray a high quality of life for their employees. Workplace wellness programs not only boost employee morale, but they can also save money in employee turnover costs. If employees feel they are valued, they may have higher job satisfaction which improves creativity and productivity.

Whatever you determine your selling points to be, make sure that they are tailored to fit the needs of your initiative. Remember, you can always adapt your messages to address different target audiences.



### **Congratulations!**

We hope that you have been successful in developing a marketing and outreach strategy for your wellness initiative. By this point, you should have covered:

- **Defining your target**
- **Reaching small businesses**
- **Utilizing media messages**
- **Small business selling points**

Once you have completed all of the above, you are one step closer to program delivery. Hopefully, by now you have begun to recruit some participating businesses and achieve some of your initial goals and objectives. Now, you are ready to move on to ***Working Well*** section that will address:

- **Working programs**
- **Gearing up for wellness**
- **Using wellness tools**
- **Evaluating net worth**
- **Overcoming obstacles**

The following section will assist you with implementing and delivering your programs to participating businesses.

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## WORKING WELL

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Planning a wellness initiative takes a lot of effort. The good news is that you do not have to start from scratch when it comes to determining a program to use for your initiative.

### Using Evidence-Based Programs

There are already several evidence-based programs available for you to implement. Evidence-based programs are programs which research has shown to produce consistently good outcomes. Therefore, using an evidence-based program within your initiative can add credibility to your project.



SAMHSA Model Programs are evidence-based programs that have been screened and tested in communities, schools, social service organizations and workplaces across the nation. These programs have provided solid proof that they have prevented or reduced substance abuse and other related high-risk behaviors. SAMHSA Model Programs have also been reviewed by SAMHSA's National Registry of Effective Programs (NREP). To learn more about these programs, visit: <http://modelprograms.samhsa.gov>.

*The Small Business Wellness Initiative delivered two evidence-based programs to small business workplaces. The following SAMHSA model programs were adapted to fit the needs of the project:*

- *Team Awareness*, an 8-hour team building/social health program developed at Texas Christian University that interweaves communication skills, peer referral and stress management, was modified to a 4-hour program called *Team Awareness Small Business*. This program was modified to a 4-hour training to meet the needs of the small businesses. For more information on *Team Awareness*, visit [www.organizationalwellness.com](http://www.organizationalwellness.com).
- *Healthy Workplace*, a multi-component health promotion approach developed by ISA Associates, was modified to *Choices in Health Promotion*, a customized program based on a needs assessment with the small business operator. *Choices in Health Promotion* modules included various topics, including Active Lifestyle; Healthy Eating; Alcohol, Drugs & Health; and Managing Stress. For more information on *Healthy Workplace*, visit [www.centerforworkforcehealth.com](http://www.centerforworkforcehealth.com).

There are many factors to consider when selecting an appropriate program for your initiative, including:

- Does the program address the risk and protective factors identified as a priority?
- Would our community be comfortable with the specified intervention components?

Prevention professionals have recognized the necessity to be culturally competent in implementing programs. Awareness of, and attention to, cultural issues in the planning and implementation stages should be considered.

*Both of the Small Business Wellness Initiative programs were adapted to be culturally appropriate by using information collected in an initial needs assessment with the small business manager. For more information about the adapted programs, visit us at: [www.sbwi.org](http://www.sbwi.org).*

## WORKING WELL

The Small Business Wellness Initiative adapted two evidence-based programs to meet the specific needs of the project.

### Working Programs

If you haven't already previewed and downloaded the programs utilized in the Small Business Wellness Initiative project, you can do so by visiting us at: [www.sbwi.org](http://www.sbwi.org). The programs are available for use, free of charge. Each program includes a PowerPoint presentation and handouts.

#### Team Awareness Small Business

Team Awareness Small Business is a team-based training program, modified from the original Team Awareness model program, developed by Dr. Joel Bennett and colleagues at Texas Christian University. The training was designed specifically to increase the awareness of behavioral health as a group concern rather than an individual burden.



#### Choices in Health Promotion

Choices in Health Promotion, adapted from the Healthy Workplace model program developed by ISA Associates, is a customized health promotion program based on a needs assessment with the small business operator or manager. The Choices in Health Promotion program used a combination of modules including the following: Active Lifestyle; Alcohol, Drugs and Health; Healthy Eating; Family Connection; Managing Stress; Safety & Moderation; Team Awareness modules; and Time and Presence.

|                                       |   |
|---------------------------------------|---|
| <i>Active Lifestyle</i>               | <ul style="list-style-type: none"> <li>• Motivate participants to adapt or enhance an active lifestyle</li> <li>• Identify steps to incorporate physical activity into daily routine</li> <li>• Demonstrate different types of exercise activities</li> </ul>                           |
| <i>Alcohol, Drugs &amp; Health</i>    | <ul style="list-style-type: none"> <li>• Increase knowledge of alcohol and its effects</li> <li>• Increase or reinforce awareness about alcohol and dangers of abuse</li> <li>• Encourage self-reflection of personal level of alcohol use and potential risks</li> </ul>               |
| <i>Healthy Eating</i>                 | <ul style="list-style-type: none"> <li>• Motivate participants to adopt or enhance healthy eating habits</li> <li>• Provide information on elements of a healthy diet</li> <li>• Identify factors associated with calorie and fat intake</li> </ul>                                     |
| <i>Family Connection</i>              | <ul style="list-style-type: none"> <li>• Engage participants at an emotional level</li> <li>• Demonstrate how to talk to children about alcohol and drugs</li> <li>• Help participants develop better parenting skills</li> </ul>   |
| <i>Managing Stress</i>                | <ul style="list-style-type: none"> <li>• Raise awareness of the impact that stress places on health and productivity</li> <li>• Encourage awareness of healthy options for dealing with stress</li> <li>• Improve or enhance stress coping skills</li> </ul>                            |
| <i>Safety &amp; Moderation</i>        | <ul style="list-style-type: none"> <li>• Heighten awareness of workplace safety concerns</li> <li>• Increase awareness of the relationship between stress and safety</li> <li>• Encourage focus on solution to safety issues</li> </ul>   |
| <i>Team Awareness Small Business*</i> | <ul style="list-style-type: none"> <li>• Improve team building and communication skills</li> <li>• Decrease tolerance and enabling of problem behaviors</li> <li>• Identify ways to enhance team health and reduce risks</li> </ul> <p><i>*Denotes a four-hour training program</i></p> |
| <i>Time &amp; Presence</i>            | <ul style="list-style-type: none"> <li>• Heighten awareness of the problem of time compression</li> <li>• Encourage presence and spiritual health as a solution</li> <li>• Help understand the value of time/intimacy in life</li> </ul>  |
| <i>Tobacco Use</i>                    | <ul style="list-style-type: none"> <li>• Provide general education on tobacco risks</li> <li>• Motivate participants to reduce or eliminate tobacco use</li> <li>• Provide an introduction to three tools relevant for tobacco cessation</li> </ul>                                     |

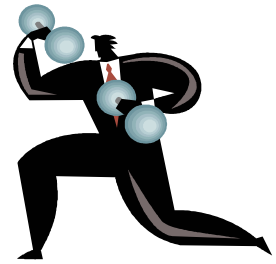
## WORKING WELL

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Careful planning and preparation can help ensure the successful implementation of your wellness initiative and program. Planning and preparation can also lead to better outcomes.

### Gearing Up for Wellness

Once you have recruited a business to participate in your initiative, it is ideal to set up an initial meeting with the individual who will help coordinate the program at the participating business. This meeting helps build rapport with the business and provides your training staff with a logistics overview. There are several important topics to address at the initial meeting, including the following:



- **Needs Assessment**-The needs assessment is designed to assist in customizing a unique program that reflects the participating business' needs. By completing a needs assessment with an organization, you will gain information that will help determine needs and options to create a program suitable to the business. Be sure to record demographic information and special needs.
- **Scheduling**-It is important to address scheduling at the initial meeting with a participating business. Keep in mind that you will need to be flexible to accommodate multiple work groups and various work shifts. Bring along a calendar with possible program dates.
- **Facilities**-It can be very useful to visit the facility where the program will be delivered. The program should take place in an area that is conducive to learning—where there is enough room, comfortable temperature, convenient location, etc. Another important factor to consider when selecting a program location is equipment. Try to visit the facility and determine your equipment needs prior to the program delivery date.
- **Workplace Tour**-If allowed, it can be helpful to tour the workplace where you will deliver the program. A tour often offers insight into the workplace culture and nature of the business. This will help the trainer get a better understanding of some of the workplace issues that may arise. In addition, a tour guide often provides additional information about the history of the organization.
- **Policies and Procedures**-If possible, obtain copies of policies and procedures relevant to the program. Some businesses may be reluctant to offer these documents, but you can reassure them that they will only be used to customize and incorporate organizational policies and procedures into the program materials.
- **Employee Participation**-You should find out at the initial meeting how the participating business plans to promote the program to employees. Some businesses may mandate the program or incorporate the program into its regular training schedule for employees. Offer additional ideas for promoting participation among employees, including posting promotional flyers in employee break rooms and in employee pay stub envelopes.
- **Confidentiality**-It is vital that participating employers and employees know that all information and policies collected from them during the course of the initiative will be kept confidential. Be sure to cover your confidentiality policy with all participating employers. This will help staff and employees to be more open when sharing information.

If the above information is not obtained in the initial meeting with the participating business, it is imperative to obtain the information through follow-up meetings or conversations. After you have the necessary information, you can begin planning and preparing for program delivery.

## ***WORKING WELL***

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There are a number of wellness tools available for you to use to implement your wellness initiative. The tools discussed in this section are available from the Small Business Wellness Initiative.

### **Using Wellness Tools**

#### **Needs Assessment**

Once a needs assessment is conducted with a participating business, the data should be analyzed and shared with the trainer conducting the program. The needs assessment provides valuable information needed to customize a program for a participating business. The Small Business Wellness Initiative developed a needs assessment for the small business operator. For more information, visit us at: [www.sbwi.org](http://www.sbwi.org).



#### **Customization**

In addition to downloading and using the Small Business Wellness Initiative program, you may customize or adapt these programs to meet the needs of your initiative. Several of the programs used in the project were customized to meet the specific needs of a participating business. For examples of customization, view the initiative's research report available on our web site at: [www.sbwi.org](http://www.sbwi.org).

In some cases, the initiative included supplementary slides to existing programs to highlight employee assistance programs and emphasize workplace policies. We also recognize that organizations may want to customize the program to reflect their own initiative. There are a few ways to customize and/or incorporate the existing programs into your initiative:

*To modify the slide master or title master in the PowerPoint program:*

1. Select one of the slides associated with the master you want to change.
2. Do one or both of the following:  
On the View menu, point to Master, and then click Slide Master.  
On the View menu, point to Master, and then click Title Master.
3. Make the changes you want. For example, change the font type, change the color or size of the text, change the bullet character, or add a picture or text box. Be sure you don't delete or add characters in the placeholder text.
4. On the Master toolbar, click Close.

*To create and include a new slide in the PowerPoint program:*

1. On the Insert menu, click New Slide.
2. Scroll through the layouts, click the one you want, and then click OK.

#### **Additional Resources**

At the back of this manual, you will find contact information for the Small Business Wellness Initiative partners. The collaborating partners offer additional resources, including technical assistance and train-the-trainer workshops, to assist you in implementing your wellness initiative. For more information about our resources and services, please visit us at: [www.sbwi.org](http://www.sbwi.org).



## WORKING WELL

One difficult challenge in implementing an effective evidence-based program is finding the right balance between maintaining program fidelity and promoting adaptation of the program to reflect the community where it is being implemented.

### Maintaining Program Fidelity

Fidelity is the degree to which a program is implemented as the program developer intended. While adaptation may be required for your specific project, it is worth noting that maintaining program fidelity is a key factor in ensuring consistent outcomes of your program.

*The Small Business Wellness Initiative developed a fidelity checklist for each program. Along with the fidelity checklist, each presentation included a program outline, as well as handout and supply checklists. It is also essential to conduct a series of train-the-trainer sessions to adequately prepare and coach trainers in effective program delivery.*

### Sample Fidelity Checklist

#### **Choices in Health Promotion Preparation Points for Trainers**

##### **GENERAL OBJECTIVES**

- All materials (handouts, slideshow) are prepared and organized in sequence for easy access and so that participants are not distracted by any lack of organization
- Material is presented in a well-paced and organized manner with adequate time for questions and answers
- Trainer speaks clearly and well paced (not too fast or too slow); There are adequate pauses for participant questions
- Trainer maintains balance between presentation of materials and facilitated interaction
- Trainer self-disclosure is appropriate and facilitates interest among participants
- Trainer shows grasp of general theory and customization process behind *Choices in Health Promotion* (makes reference to ideas that led to the development of *Choices*)
- Trainer states objectives of overall training and each module
- There is a flow within each module and from module to module
- Trainer encourages participant involvement
- Trainer presentation exhibits vitality and healthy manner
- Trainer shows memory for previous participant comments and integrates into flow of the training
- Trainer is sensitive to self-disclosures and maintains atmosphere of confidentiality
- Trainer works with classroom distractions and easily reorients distracted participants
- Trainer keeps atmosphere of team-work; preventing any one participant from dominating discussions

### Supply Checklist

While the supplies needed for program delivery will vary from program to program, most programs will require the following:

- Laptop
- Projector
- Screen
- Pens
- EAP or Supplementary Handouts
- Training Evaluations
- Flipcharts
- Markers
- Tape
- Extension Cord
- Power Strip
- Easel
- Incentives

## **WORKING WELL**

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Just as some initiatives work better than others, some workplace wellness programs may be more successful than others. As with any program, increasing awareness must occur before people can take action and maintain a change.

### **Evaluating Net Worth**

You developed some goals and objectives in the first part of this manual. While there are several ways to evaluate the success of a program, it is best to evaluate your success based upon your established goals and objectives. In addition, you may also want to highlight some of your successes:

- How many businesses participated in your initiative?
- Were participants satisfied with the program?
- Which aspects of the program were best received?
- Did the program improve knowledge about wellness issues?
- Did the program change behavior?



*The Small Business Wellness Initiative used an experimental design with pre, post and follow-up surveys to determine effectiveness of our programs. For a full research report, visit [www.sbwi.org/research/research.htm](http://www.sbwi.org/research/research.htm).*

*For a variety of measurement tools and options in evaluating program effectiveness, visit our partner, Organizational Wellness & Learning Systems at: [www.organizationalwellness.com](http://www.organizationalwellness.com).*

## **WORKING WELL**

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Wellness and prevention programs can sometimes be difficult to implement and often face many challenges. It may be helpful to forecast what these challenges or barriers might be and generate possible solutions for dealing with them.

### **Overcoming Obstacles**

Certain obstacles may arise when implementing a wellness initiative targeted at small businesses. However, there are several things you can do to ensure successful implementation of your programs. Some of those things include:

- Having an infrastructure in place to effectively communicate and market the benefits of the initiative and its programs
- Ensuring staff receive thorough orientation and training to learn and distinguish the primary components of the initiative
- Establishing working relationships with community organizations and agencies to recruit businesses to participate and to direct participants in need of help outside of the initiative's area of expertise
- Having supportive relationships and promoting a team environment among collaborators and staff
- Planning ahead to appropriate adequate costs and efforts to recruitment and retention activities
- Having access to services and agencies that can provide assistance to workers in various areas of health and wellness



Small businesses also pose a challenging market. Things that should be considered when working with small businesses include:

- Employers, especially at smaller firms, sometimes do not feel that they have the resources, staff or time to implement such programs
- Small business employers sometimes believe they are immune to problems evident in larger corporations
- Finding an internal champion within the small business can be essential to the successful recruitment of a small business
- Internal miscommunication within the small business can sometimes be challenging
- Finding the right mix between programs and scheduling may differ from one business to the next
- Initiative staff must demonstrate ability to be flexible to accommodate small business needs and schedules
- Various literacy levels of a small, but important, number of workers in some settings
- Seasonal differences in receptivity to participate from small business owners

### Congratulations!

You have successfully completed the *Wellness Pays* replication manual. In the last section, you should have covered:

- **Using evidence-based programs**
- **Working programs**
- **Gearing up for wellness**
- **Using wellness tools**
- **Maintaining fidelity**
- **Evaluating net worth**
- **Overcoming obstacles**

The Small Business Wellness Initiative would like to congratulate you on your efforts in implementing a wellness initiative. We hope that by now you have evaluated and achieved your goals and objectives set forth in the first section. We know that you have already laid a great foundation for your initiative. We would love to hear about it. As mentioned in previous sections, additional resources, including technical assistance and train-the-trainer workshops are available to organizations like yours. Please feel free to contact us.

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## **RESOURCES**

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### **Worksite Wellness Programs**

Thinking about bringing wellness to your workplace? The hard part is already done. The Small Business Wellness Initiative developed research-based wellness programs that can be delivered to employees at any worksite. We developed wellness programs that can be customized to meet the specific needs of your workplace.

For more information on the Small Business Wellness Initiative programs and to download free worksite wellness programs, visit us at: [www.sbwi.org](http://www.sbwi.org).

### **Technical Assistance**

Not sure where to begin? Our partner can help. Tarrant Council on Alcoholism & Drug Abuse can provide technical assistance in delivering one of our wellness programs or in implementing a wellness initiative in your area. Utilize our expertise to assist you in building a more productive workplace and healthier community.

For more information, contact:

*Kelly Heath*  
*Tarrant Council on Alcoholism & Drug Abuse*  
*1701 West Freeway, Suite 1*  
*Fort Worth, TX 76102*  
*(817) 332-6329, ext. 219*  
[www.tarrantcouncil.org](http://www.tarrantcouncil.org)

### **Train-the-Trainer Workshops**

Do you already have your own wellness or training staff? Are you ready to begin offering the Small Business Wellness Initiative programs to your workplace or community? Organizational Wellness & Learning Systems offers train-the-trainer workshops that will enable you or your training staff to deliver one of our wellness programs to your employees or clients. Train-the-trainer workshops are complete with training presentations, facilitator notes and employee handouts.

For more information, contact:

*Joel Bennett*  
*Organizational Wellness & Learning Systems*  
*413 Overton Terrace Court*  
*Fort Worth, TX 76107*  
*(817) 921-4260*  
[www.organizationalwellness.com](http://www.organizationalwellness.com)

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