SCHOOL EMPLOYEE WELLNESS
A Guide for Protecting the Assets of Our Nation’s Schools

ESTABLISHING A SCHOOL EMPLOYEE WELLNESS PROGRAM
KEY PRINCIPLES FOR SCHOOL EMPLOYEE WELLNESS PROGRAMS

Four key principles should be kept in mind when establishing a school employee wellness program.

(1) Integrate into the coordinated school health program

A coordinated school health program is a model for creating health-promoting school environments for students and their families as well as employees of school systems. In 1987, Allensworth and Kolbe proposed an eight-component model for school health programming. This model (Figure 2) included worksite health promotion that the authors called “school site health promotion of faculty and staff.” In 1998, it was suggested that school-site health-promotion programs would be more effective if the functions of the program were an integral part of the overall coordinated school health program.

Figure 2

(2) Tailor to the health needs of the participants

The traditional approach to developing school employee wellness programs has been “cafeteria-style” (i.e., offering choices from an array of activities). These activities-centered programs boost morale, develop awareness, and expose employees to opportunities to engage in activities. They tend to attract the “worried well” or those who are likely to practice healthy behaviors even if they have no program to engage them. Some districts are turning to a results-oriented or “population health management” approach to school employee wellness. This approach uses annual individual health risk appraisals to provide data as a basis for designing targeted health-promotion interventions. By focusing on identified health risks, it aims to attract people who are most at risk and less likely to participate in health-promotion activities. For example, these programs reward employees for participating in smoking cessation programs and help individuals with high cholesterol to change their diets and increase their physical activity.
(3) Start small and build a foundation

Existing school employee wellness programs vary in scope and size. Some districts conduct health risk assessments and offer health risk reduction interventions that target identified personal health risks. Others organize activities such as walking programs, health fairs, access to fitness centers, nutrition management, and stress management. The decision to offer these activities is generally based on a survey of potential participants’ interests and motivation, the availability of facilities or resources, and the interests and skills of the coordinator and other support staff. Some school employee wellness programs are staffed by volunteers; others have paid staff or wellness leaders. Some are funded by grants or tax revenues; others charge fees for participation; and still others are cost-free, using school facilities and offering classes and activities organized by volunteers. Starting small can provide the foundation for evolution to a more ambitious, comprehensive, results-oriented program. School districts should start with the element or elements that can be most easily introduced and later build on that foundation.

(4) Gather support from a cross section of the school community

Allies already exist within school systems who realize the importance of promoting the health of school employees. These allies can be conceptualized as obvious allies and less obvious allies.

The school employees who implement the other seven components of coordinated school health programs are obvious allies who can make valuable contributions to the eighth component, school employee wellness. These allies include health educators; physical educators; licensed health professionals within the school such as school nurses, licensed or vocational nurses, medical doctors, nurse practitioners, audiologists, audiometrists, physical therapists, and certified personal trainers; mental health professionals within the school such as psychologists, social workers, and counselors; and nutrition services staff.

Less obvious allies often can be more powerful in the effort to establish a school employee wellness program. Whereas members of “school health teams” are highly qualified to address physical, mental, and social health needs, they are unlikely to be part of the organizational structure of school districts, where policies are crafted and decisions, especially those with fiscal implications, are made. Less obvious allies are more likely to have direct access to the superintendent, be part of the superintendent’s cabinet, and communicate freely with the governing board (school boards and commissioners). These potential supporters might occupy positions such as the school district’s chief financial officer, administrator of human resources, risk benefit officer, and employee assistance program manager. Elected officials of the bargaining units for employee groups are also potential supporters.

THE NINE STEPS FOR ESTABLISHING A SCHOOL EMPLOYEE WELLNESS PROGRAM

This guide proposes a nine-step process for establishing a school employee wellness program, as shown in Figure 3.

**Figure 3**

*Steps for Establishing a School Employee Wellness Program*

Step 1: Obtain administrative support

Step 2: Identify resources

Step 3: Identify a leader

Step 4: Organize a committee

Step 5: Gather and analyze data

Step 6: Develop a plan

Step 7: Implement the plan

Step 8: Evaluate and adapt the program

Step 9: Sustain the program
Some districts may find it necessary to start at Step 1, whereas others may have already completed some of the initial steps. Where a school district should start can be determined by answering questions such as:

- Does our district already have a district school health council in place?
- How much administrative support, community support, and employee interest do we have?
- What resources (facilities, time, personnel) are available?

**Step 1: Obtain Administrative Support**

“To survive and be successful, a health promotion program must contribute to the mission, long-term goals and short-term priorities of the organization it serves and to the special interests of those who approve its budgets.”

— Michael P. O’Donnell, Editor-in-Chief, American Journal of Health Promotion

The primary mission of any school district is to educate its students to ensure that they achieve academically and are prepared to become productive members of society upon completing their education. Consequently, the first question to address is “How will a school employee wellness program help our district achieve its primary mission?” The potential benefits of school employee wellness programs are summarized in Figure 1 on page 8 of this guide.

For a school employee wellness program to be successful and sustainable, it needs the support of the superintendent and school board at the district level and the principal and vice principal(s) at the school level, as well as other powerful decision makers within the school system. Other powerful decision makers within the school system who are crucial to gaining administrative support and funding for employee wellness programs include the following:

- Chief financial officers, who are responsible for the annual budget for a school district;
- Administrators of human resources, who are responsible for personnel and employee health benefits; and
- Managers and/or counselors of employee assistance programs and officials of bargaining units, who represent the interests of various employee groups.

Decision makers in school systems require data to make their decisions about policies and programs. The following types of data can help support the need and make the case for a school employee wellness program:

- Numbers and reasons for employee absenteeism from the human resources office,
- Financial and academic costs for substitutes from the business office,
- Injury incidence and workers’ compensation claims from the benefits office,
- Health care utilization and health care costs from the benefits office,
- Employee turnover from the human resources office,
- Union or employee grievances from the human resources or business office,
- Chronic health conditions from the health department, and
- Surveys of interests from employees.

“Give the school board the facts and back them up with research. Our district is self-insured and employees pay no health insurance. I demonstrated that [in our district] 1.7% of the population utilized 70% of insurance costs and 12% spent 90% of insurance costs.”

— Debbie Zimmerman, Wellness Manager, Polk County Public Schools, FL
The following tips can help in obtaining administrator support:

- Suggest that the district send a team that includes an administrator and a school board member to a statewide school wellness conference, if offered.

- Contact the state education agency to identify districts with employee wellness programs whose superintendents, school board members, or principals might be willing to speak with your district’s policymakers.

- Develop or adapt a PowerPoint presentation that demonstrates the need for and benefits of a school employee wellness program in the context of a coordinated school health program (see the Appendix at the end of this guide for information on obtaining the PowerPoint presentation "Making the Connection"). Be sure to keep the audience in mind when planning your presentation. Presentations to school boards and superintendents’ cabinets are usually limited to 3-5 minutes. For audiences composed of decision makers and stakeholders, presentations can be longer. A sample PowerPoint presentation about the importance of a school employee wellness program can be found on the School Employee Wellness website at www.schoolempwell.org.

- Develop a communication plan, including a script for the first visit.

Many publications have information on advocating for a school employee wellness program in the context of a coordinated school health program. See the Appendix for a list of some of these resources.

### Step 2: Identify Resources

"Seeking donations would have been much more challenging if I had not done the groundwork, such as attending community events and being vocal about the need for healthy workers."

— Kelly Meadows, Little Cypress-Mauricerville Consolidated Independent School District, TX

Implementing a school employee wellness program requires a variety of resources such as qualified personnel to oversee and offer programs, space to conduct programs, equipment and supplies to carry out activities, and information about specific issues. Many resources might already be available in your school district or through partnerships with agencies and organizations in your community. Others can be obtained from state or national agencies and organizations.

### School/District Employees

Many school employees are professionally prepared to support health-promotion interventions. These employees include the following:

- Professionally prepared school health educators who have expertise about not only current, science-based information that is needed to make health-promoting decisions, but also strategies for developing the attitudes and skills required for adopting behaviors that will protect and promote health.

- Licensed professionals who deliver direct health care and preventive health services at school sites and at school-based health centers. Among them are licensed and/or credentialed school nurses, licensed vocational (or practical) nurses, consulting and/or staff medical doctors, nurse practitioners, physician assistants,
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licensed and/or certified audiologists, certified audiometrists, licensed physical therapists, and certified athletic trainers. These providers can assist with screenings, referrals for emergency care, and education for cardiopulmonary resuscitation (CPR), health promotion, disease prevention, and medical self-care.

- **Physical education teachers** who have expertise in exercise physiology, physical fitness, prevention of exercise-related injuries, and the relationship between caloric intake and energy expenditure. Further, physical education staff members are aware of the facilities and equipment at school sites that can be made available to employees when not being used by students.

- **School-based mental health professionals** such as licensed and/or school credentialed psychologists, licensed and/or school credentialed social workers, and counselors with a wide range of professional preparation and licensure. Some school counselors are licensed family and marriage therapists, while others are credentialed as school counselors who focus primarily on academic counseling (as opposed to mental health counseling). These professionals have experience assessing risk and providing interventions. Further, these mental health professionals have established relationships with agencies that provide mental health services and respond to mental health crises.

- **Nutrition professionals**, often registered dietitians, who oversee the nutritional content and safety of food served at schools in the school district, are trained to promote good nutrition and healthy eating.

- Other employees may have special skills that are not related to their role within the district such as teaching dance, martial arts, and yoga.

Drawing on employee talents, skills, and expertise has a number of advantages. Employees understand the education environment and the needs of their colleagues. And, as members of the school community, they are likely to be trusted by program participants. Some school-based health centers also provide school employee wellness services. While most focus only on students, some have contracted with schools to provide support for employees as well. When school-based health centers or clinical staff provide services to school employees, policies need to be in place to address confidentiality and liability and to specify services to be offered.

### CONTRIBUTIONS OF A COORDINATED SCHOOL HEALTH PROGRAM COORDINATOR TO SCHOOL EMPLOYEE WELLNESS

When the position of a district school health coordinator already exists, this person will be able to provide support for and assistance with developing the school employee wellness component. A successful district school health coordinator is well positioned to contribute to improving and protecting coordinated efforts to improve and protect the health of employees, as he or she will already:

- Have well-established working relationships with members of the district school health council, including licensed nurses and other health care professionals, health educators, physical educators, nutrition professionals, mental health professionals (psychologists, counselors, and social workers), and maintenance personnel.

- Collaborate with administrators responsible for the coordinated school health program.

- Communicate on a regular basis with providers of physical and mental health care, as well as social services in the community served by the school district.

- Convene (or participate as a member of) a district school health council, with representatives from the community who share the goal of protecting and improving the health of students and their families.

- Have fostered active participation of parents, who represent the ethnic, cultural, socioeconomic, and linguistic diversity of the community served by the school district.
Community Partners

Most districts already have partnerships with community agencies and organizations upon which they can build. One desirable qualification for the district school health coordinator is knowledge of and good connections with community resources. In addition, a well-organized district school health council will have members who either represent or have relationships with community service providers. Potential community partners can include the following:

- **Local health departments** frequently partner with school districts to promote health. Most health departments have some type of health-promotion program. Their staff members are trained to organize and offer health-promotion interventions and to assist with collecting, interpreting, and using health data for program development and evaluation. They also can assist with providing services such as immunizations. Local health departments can clarify health issues of particular concern to staff such as who should receive flu shots.

- Many **hospitals** are eager to partner to provide community service, strengthen their public image, and fulfill their commitment to health. Hospital staff members can assist with health screening and assessment, organizing health fairs, and offering workshops on stress, weight management, and medical self-care.

- In some districts, **parent organizations** such as the Parent Teacher Association can be very influential in the adoption of school policies. They can also help solicit donations from the community such as water bottles, fitness equipment, and other items useful for an employee wellness program.

- **Voluntary health organizations** such as the American Cancer Society, American Heart Association, American Lung Association, and the American Red Cross have programs targeting health issues that affect school employees. For example, the American Red Cross has developed modules and offers training on first aid, CPR, use of automated external defibrillators, dealing with HIV and other bloodborne pathogens, and emergency preparedness in schools and the workplace.

- In some communities, the **YMCA** and **YWCA** offer facilities and programs to support health.

- **Local businesses** can donate access to facilities, supplies, and healthy food items or services such as printing. Fitness centers are frequently willing to offer discounts.

- The local **media** can provide publicity through articles or interviews about the benefits of school employee wellness activities. Such publicity can generate additional community interest, participation, and support.

- Other potential partners include **civic organizations** such as the Lions Club and Rotary Club, **health insurance companies** and **HMOs**, **police**, **community colleges** and **universities**, and **physicians**.

Funding

There are many potential funding options for a school employee wellness program. A program may charge **registration fees** to offset some of the costs. A small fee also may reduce attrition. **District revenues** are another option. As community understanding and support increase, funding for school employee wellness activities may become a line item in the school district budget. Health care and substitute cost savings can also offset costs.

Another option is to seek federal, state, and/or private funding. Some districts obtain state or federal grants that support school employee wellness as part of a larger program. For example, the director of instructional services for public schools in Wilson, New York, applied for and received a U.S. Department of Education Carol M. White Physical Education for Progress grant that was used to develop fitness centers in the district’s schools. All employees have access to the equipment during the school day when students are not using it, and the space is open and available every afternoon from 3 to 5 p.m.

Private funding sources include foundations, corporations, voluntary agencies, and community groups. Private sources typically have specific criteria for their funding, such as geographic location, populations targeted (e.g., youth, elderly, and underserved), and issues addressed (e.g., education, disease prevention, and health services).

When seeking funding from private sources, the following should be determined about the funding source:
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Responsibilities of a Coordinator of a Coordinated School Health Program

The National Association of State Boards of Education has published a description of responsibilities for the coordinator of a coordinated school health program. The description states:

“Each school/district shall appoint a school health coordinator to assist in the implementation and coordination of school health policies and programs by:

- ensuring that the instruction and services provided through various components of the school health program are mutually reinforcing and present consistent messages;
- facilitating collaboration among school health program personnel and between them and other school employees;
- assisting the superintendent/school principal and other administrative staff with the integration, management, and supervision of the school health program;
- providing or arranging for necessary technical assistance;
- identifying necessary resources;
- facilitating collaboration between the district/school and other agencies and organizations in the community that have an interest in the health and well-being of children and their families; and
- conducting evaluation activities that assess the implementation and results of the school health program, as well as assisting with reporting evaluation results.”

Step 3: Identify a Leader

“Coordinators are the soul of the program.”
— Robin Atwood, University of Texas, Austin

The school employee wellness leader may be an existing employee with a commitment to health such as a health educator, physical educator, nurse, psychologist, counselor, or other member of the school staff. The district school health coordinator might also fulfill the role of school employee wellness leader in some cases.

- Its mission or special interests,
- The types and sizes of awards available,
- Application guidelines, and
- Contact information.

The Appendix lists other resources that can help in developing a school employee wellness program, including information about specific funding sources.
Similar to school health programs for students, employee wellness programs are sometimes insufficiently developed because a specific employee is not assigned the responsibility of implementing the program, or because program implementation has been added to the responsibilities of a staff member with limited time. Individuals who participated in the pilot test of this guide indicated that school employee wellness programs were more likely to be sustained if leaders were paid an additional stipend for the extra responsibilities of implementing the program, or if these responsibilities were incorporated into their job description.42

A school employee wellness leader should have skills in writing, organizational management, marketing, and budgeting. A school employee wellness leader should expect to undertake the responsibilities listed in Figure 4. The school employee wellness leader should share these responsibilities with the school employee wellness committee discussed in Step 4.

A school employee wellness leader should:

- Know the district’s mission and goals, and relate the school employee wellness program to those goals.
- Be visible! Get involved wherever possible.
- Find out what employees do; learn what their workday is like.
- Stay current with the research that supports school employee wellness activities.
- Learn what other programs are doing; visit worksite health-promotion websites and network with school employee wellness leaders in other school districts.
- Identify allies and build a committee.
- Incorporate health promotion into his or her professional development.
- Promote the program at every opportunity, using newsletters, websites, e-mail, posters, and any other available communication channels.

Figure 4

School Employee Wellness Leader Responsibilities

- Coordinate the development, implementation, and evaluation of the school employee wellness program, including needs assessments and data collection.
- Represent the school employee wellness component on the district’s school health council.
- Communicate regularly with the administration about the status of school employee wellness activities and make recommendations and suggestions for program planning.
- Report at least annually to the school board.
- Convene (and participate in) regular meetings of the school employee wellness committee.
- Arrange trainings and employee development opportunities in consultation with the superintendent and personnel director.
- Communicate with school employees, using channels such as e-mail messages, websites, print newsletters, posters, and announcements.
- Identify resources for and schedule school employee wellness activities.
- Develop relationships with community health providers (e.g., local health departments, hospitals, neighborhood clinics, health professionals), recreational facilities, voluntary health organizations (e.g., American Cancer Society, American Lung Association, American Heart Association), and other community members who can provide resources for or support school employee wellness activities.
- Develop and administer the budget.
Step 4: Organize a Committee

“One person can do only so much. A team of people who are good motivators champion the program and get people involved.”

— Michelle Burke, School Health Coordinator, Hudson Falls Central School District, NY

Organizers of coordinated school health programs find that many components of the program already exist in a school district. Similarly, the core of a school employee wellness committee may already be in place. For example, a health insurance advisory committee or a similar group that is responsible for school employee benefits might be a good place to start. A district school health council may have all the necessary elements, even if they have not focused on school employee wellness, or an existing wellness committee can be expanded. If preexisting groups are not interested in expanding their activities, invite them to send a representative to join the school employee wellness committee.

School employee wellness committee members can be identified in a variety of ways. They may be selected by the person designated to lead the program, a school administrator, or a combination of sources. After initial organization, the committee might be self-perpetuating and become responsible for determining its own membership, or a district might develop policies to specify the process for becoming a committee member.

Members of a district school health council or a separate employee wellness committee need to represent a variety of stakeholders and bring diverse skills and interests to the group. Include people who influence policy and are willing to take responsibility for carrying out tasks. Members of the committee that addresses school employee wellness may include the following:

- Representatives of the people the program will affect. In many districts, they are representatives of bargaining units (see box below for tips on how to obtain union buy-in). In districts where employees are not unionized, representatives include teachers, teacher aides, bus drivers, custodians and maintenance staff, secretaries, and food services workers.
- Representatives of the other components of a coordinated school health program (health education, physical education, health services, mental health and social services, nutrition services, family and community, and environment, including maintenance staff).
- An administrator who has access to the superintendent and the superintendent’s cabinet.
- Managers who have a stake in school employee wellness such as managers of human resources, employee assistance programs, employee development, workers’ compensation, benefits, insurance, legal, risk management, and facilities (environmental health and safety).
- Representatives of community resources such as the local health department, physical and mental health care providers, recreational and fitness facilities, insurance carriers, voluntary health organizations (e.g., American Cancer Society, American Heart Association, American Lung Association, American Red Cross), and professional associations such as the local medical society.

Tips for Obtaining Union Buy-in

- Approach unions early in the organizational process. Unions represent the employees who will benefit from the wellness program. Their buy-in is key.
- Start by contacting the president of the union local. Find out who the president is by contacting the district’s business office or human resources department or the union’s state affiliate. Affiliates can be found on the union’s website.
- Make the case for union involvement. Describe the benefits of a school employee wellness program. Compelling arguments might focus on occupational health and safety or on moderating increases in health insurance premiums.
- If the union president cannot find the time to represent the union, she or he might know a union member who would be willing to champion the issue on the union’s behalf.93
Some wellness committees recruit members informally with a face-to-face invitation. Others use written communications. A sample letter that can be adapted to the needs of a particular school or district is included in the Useful Tools for School Employee Wellness Programs section of this guide.

When people are invited to join the committee, they will need to know what to expect. Suggested committee member expectations that should be shared with potential members during recruitment include the following:

- Meet regularly to plan, develop, review, and evaluate activities.
- Attend statewide wellness conferences in states where they are offered.
- Inform school employees about program plans and obtain feedback (distributing materials and communicating by e-mail and in person).
- Share concerns and provide positive and negative feedback from the school employees.
- Assist with assessing needs and mapping resources.
- Coordinate school employee wellness activities with student health-promotion activities.
- Advocate for and participate in activities.
- Assist with setting priorities for program offerings and expenditures.
- Ensure that activities are aligned with the district’s policies and norms.

A needs assessment provides key data to develop support for and plan a program. Data about school employee wellness programs are gathered to:

- Determine baseline health-related costs and risks in the district to justify investment in the program and to demonstrate progress and cost savings after implementation;
- Assess the status of school employee wellness activities; and
- Identify the interests of school employees.

The data collected at the outset will provide a baseline for monitoring, evaluating, and adapting the program over time. Collecting data periodically can help make program changes that address changing employee interests and needs.

The data collected could answer questions such as the following:

- What is our district spending on health care, health insurance, and health promotion? What are other health-related costs such as workers’ compensation or compensation for substitute teachers?
- What are employees’ health concerns?
- What are employees’ health interests?
- How is our district currently addressing school employee wellness?
- How ready are our employees to participate in a program? What are they already doing?
- What health risks do we need to target?

**Determine Baseline Health-Related Costs and Risks in the District**

A school employee wellness leader can cooperate with human resources, risk management, and benefits administrators to determine the district’s health care costs (including insurance), workers’ compensation claims, numbers and absenteeism (including cost of substitute teachers), employee turnover, and other health-related costs. An analysis of reasons for absenteeism (illness or personal leave versus leave for jury duty or family emergencies) and insurance claims might help to identify health conditions on which to focus. An examination of the basis for workers’ compensation claims might reveal occupational hazards that need to be addressed.
These data should be revisited periodically to identify changes in costs and reasons for absences or compensation claims (see Step 8: Evaluate and Adapt the Program).

Assess the Status of School Employee Wellness Activities

Tools are available for assessing the status of school employee wellness activities. These tools help to examine the following:

- How well school employee wellness is addressed,
- District strengths,
- Areas for improvement, and
- How to build on strengths to develop a better program.

A sample survey for assessing a school employee wellness program can be found in the Useful Tools for School Employee Wellness Programs section of this guide.

Tools exist to assess physical activity, nutrition, tobacco use, asthma, and safety for each of the eight components of a coordinated school health program, including school-site health promotion for employees. The School Health Index (SHI): A Self-Assessment and Planning Guide from CDC is one such tool. It was developed to help schools identify the strengths and weaknesses of their health and safety policies and programs and plan for improvement. Teams complete eight modules, each of which examines one component of the coordinated school health program, including school-site health promotion for employees.

School officials have reported that, after completing the School Health Index, sites often decide to start their coordinated school health program activities with a focus on school-site health promotion for employees because they find this component is the least developed, or because they consider a focus on school employee wellness a strategy for generating employee buy-in. See the Appendix for information on where to obtain the School Health Index.

Two other tools are Step by Step to Health-Promoting Schools: A Guide to Implementing Coordinated School Health Programs in Local Schools and Districts and Step by Step to Coordinated School Health: Program Planning Guide. They provide worksheets and checklists for each of the eight components. Both guides are available from ETR Associates. See the Appendix for information on obtaining them.

Identify the Interests of School Employees

Using an employee survey to initiate a wellness program can stimulate awareness of and interest in health promotion, give employees a sense of ownership, and ensure that activities are responsive to the needs and concerns of potential participants. An employee survey can identify areas of employee interest, assess health behaviors, and ascertain levels of readiness. Some districts conduct health screenings for conditions such as high cholesterol, high blood pressure, and tobacco use to determine the proportion of employees with health risks; they then target the most common risks. In all cases, the confidentiality of employee responses must be ensured. The questions employee surveys can address include the following:

- What do employees need?
- What do they want to do?
- How ready are they?
- When and how do they want to do it?

Data will help direct a school employee wellness plan. A district or school employee wellness committee should decide which approach to data collection will best meet the needs of school employees.

See the next section of this guide, Useful Tools for School Employee Wellness Programs, for a sample of surveys that can be used to gather data about and for a school employee wellness program.
Step 6: Develop a Plan

“Emphasis needs to be on building sustainable change for achieving and maintaining positive health outcomes. You need to develop an infrastructure that provides cross-component activity and includes policies that ensure continuity.”

— Lola Irvin, School Health Coordinator, Hawaii State Department of Health

A well-developed plan provides a blueprint for program activities, develops ownership and investment of stakeholders who participate in the planning process, and demonstrates to the school board, administrators, and taxpayers that the desired outcomes justify the use of resources.

Relating the plan’s goals, objectives, and activities to a district’s goals, objectives, and activities can further increase the likelihood of acceptance and success. Incorporating the school employee wellness plan into the district’s overall improvement plan can help to institutionalize the program.

A well-written plan spells out clearly why, how, when, and by whom activities will be accomplished. The plan needs to link the employee wellness program to the district’s mission of educating its students. It should be culturally competent (see page 23) and should include the following:

- A mission statement,
- Goals,
- Measurable objectives,
- Activities to meet objectives,
- A budget, and
- An evaluation plan (see Step 8).

A mission statement, goals, measurable objectives, and activities to meet objectives are discussed further below.

A Mission Statement

A mission statement sets the stage for establishing goals and objectives. The process of developing it will clarify what an employee wellness program hopes to accomplish and will provide a forum for open discussion of committee members’ expectations. The following questions should be considered:

- What is our vision for a school employee wellness program?
- How does the vision relate to the district’s mission?

A school employee wellness program that is part of a coordinated school health program could adopt the coordinated school health program’s mission statement or define its mission within the context of the coordinated school health program’s mission statement. An example of the latter might be: “To develop health-promoting knowledge, attitudes, and behaviors among all employees and maintain a worksite climate that fosters well-being within the context of a coordinated school health program.” Alternatively, a school employee wellness committee may choose to create a more targeted and personal mission for the program. See the Useful Tools for School Employee Wellness Programs section of this guide for a sample mission statement.

Goals

Goals are broad statements of what must be accomplished to achieve a vision. CDC’s School Health Policies and Programs 2000 study found that districts’ staff health-promotion goals commonly included improving employee morale, creating an environment in which employees serve as healthy role models for students, reducing the number of sick days used, reducing the cost and use of insurance, and reducing the number of employee injuries.

When setting goals, school employee wellness leaders and committee members should be realistic about what they can accomplish and remember that goals can be both short term and long term. Also, it is not necessary to address all goals simultaneously; the goals can articulate what the program intends to achieve over time.

Program goals might address implementing the elements of a school employee wellness program; for example:
Goal 1. Offer or implement health education tailored to employees' needs and interests.

Goal 2. Develop a supportive social and physical environment.

Goal 3. Integrate school employee wellness into the district culture.

Goal 4. Develop linkages to programs that help employees balance work and family (e.g., an employee assistance program).

Goal 5. Offer screening programs.

Goal 6. Offer interventions to support individual behavior change.

Goal 7. Help employees become better informed about when and how to use health care services.

Goal 8. Evaluate and improve school employee wellness program activities.

With information from authorized fiscal services, fiscal goals such as the following might be established:

- Decrease workers’ compensation claims.
- Reduce health care costs.

Another consideration might be state priorities. For example, if a state’s governor is promoting a tobacco-free program or if the state department of education is linking physical activity and academic achievement, the school employee wellness leader and committee might choose to incorporate these concepts into the program’s plan. However they are framed, goals provide a basis for objectives.

**Activities to Meet Objectives**

After goals and objectives have been developed, program planners need to decide on the most appropriate activities to help achieve them. One or more activities may be planned for each objective. Research has shown that, in health promotion, several activities rather than a single activity are more likely to affect the target population.46

**Planning and Cultural Competence**

Cultural factors need to be considered when planning a school employee wellness program. Racial, ethnic, cultural, and linguistic diversity are increasing and changing the nation’s workforce as well as its school populations. Addressing the health concerns and needs of diverse populations requires cultural competency. Many definitions exist for “cultural competency,” including the following from the American Medical Association: “The knowledge and interpersonal skills that allow providers to understand, appreciate, and work with individuals from cultures other than their own. It involves an awareness and acceptance of cultural differences; self-awareness; knowledge of patient’s culture; and adaptation of skills.”47 Being able to provide for employees of all cultures demonstrates that every employee is respected and valued.

In addition to language barriers, critical factors to consider when developing a culturally competent plan include an understanding of the following:

- Beliefs, values, traditions, and practices of various cultures;
- Culturally defined, health-related needs of individuals, families, and communities;
- Culturally based belief systems about health, healing, and the causes of disease; and
- Culturally based attitudes toward seeking help from health care providers.48

Questions to assess the cultural competence of an employee wellness program include the following:

- Do policies and choices of the wellness staff reflect the interests of the diverse populations served?
- What do I need to know about the cultures of those with whom I am working?

**Measurable Objectives**

Objectives are statements of what you will do to achieve each goal. Objectives need to be specific, measurable, achievable, relevant, and timebound (SMART). They answer questions such as:

- What is expected to change or happen?
- What/how much change is expected?
- Where will the change occur?
- When will the change occur?
What attitudes or beliefs do I have that can negatively influence perceptions of or interactions with individuals who are ethnically, racially, or economically different from me?

Are my assessment tools and interventions culturally appropriate?

How can we use staff development opportunities to educate other school staff about approaches to respecting cultural differences?

Other tips for culturally competent planning include the following:

Create a multicultural calendar that respects important dates of various cultures. Chase's Calendar of Events: The Day to Day Directory of Special Days, Weeks, and Months, available from bookstores and online, is a popular tool.

Do not schedule meetings or other important events on the major holidays of any religious group.

Make sure that school nutrition programs offer options for employees and students with dietary restrictions, including cultural restrictions.

Avoid singling out employees of a particular race or ethnicity to address diversity issues on everyone else’s behalf.

Develop a roster of interpreters to assist with communication.

Ensure that your workplace complies with accessibility requirements of the Americans with Disabilities Act.

**Step 7: Implement the Plan**

“Baby steps are what you have to take. You’d like to see 100 people but only 10 show up. Be patient and unafraid to try new things. What is right for one is not right for the other.”

— Sherrie Yarbro, School Health Coordinator, Tipton County Schools, TN

Initial employee wellness program efforts commonly target awareness raising and engaging school employees in activities that address key health concerns. It might take a while for people to show up at events or decide that they want to engage in better health habits. Consider starting with a simple initiative that costs little or nothing, is easy to implement, provides visibility, and promises immediate success for the school employee wellness program. Examples include a month-long walking program, a presentation on the relationship of nutrition and fitness to stress, or a staff development day that features a health-related session or to which a motivational speaker is invited. This section covers activities to consider when launching an employee wellness program.

**Offer Health Screenings**

Districts, often in collaboration with local health care providers such as community hospitals and local health departments, schedule screenings for a broad array of conditions – such as cardiovascular disease, diabetes, glaucoma, sickle cell anemia, prostate cancer, breast cancer, skin cancer, and oral cancer – and basic health measures such as blood pressure, cholesterol, substance use, height, weight, body fat, bone density, hearing, and vision. For healthy screenings, it is important to provide a setting that ensures privacy. Participants should be assured that all personal information will be kept confidential and will not be made available to anyone without their permission. Screenings can be offered on a stand-alone basis or they may be part of a larger event such as a health fair.

Screening makes participants aware of health risks, identifies those who need help, provides a basis for targeting follow-up interventions, and might motivate individuals to take action. Follow-up, depending on the need or condition, might require referral to the employee’s health care provider, or it might involve developing interventions such as weight management programs, asthma support groups, stress management measures, smoking cessation opportunities, or an employee assistance program.

**Take a Team to a Wellness Conference**

A number of states organize annual employee wellness conferences. Employee wellness committees that attend are often motivated to engage in positive health behaviors, facilitate team-building, support action planning, and provide opportunities for networking. Districts have found that attendance
Establishing a School Employee Wellness Program

Introduce Only One or Two Activities

Start with a simple activity that is easy to implement and that provides school- or district-wide visibility at little or no cost. Use posters, newsletters, payroll stuffers, e-mail and website postings, announcements at union and employee meetings, and individual contact as strategies to raise awareness. Plan a kickoff event with special activities that entice people to notice school employee wellness efforts. An endorsement by the superintendent or other key administrator is a powerful strategy for promoting participation.

"Early interventions need to be simple and accessible. Everybody needs somebody to get them started. They want you to come to their building and start with something that doesn’t take a lot of time."

— Sherrie Yarbro, School Health Coordinator, Tipton County Schools, TN

Offer Health-Related Sessions As Part of Staff Development

Featuring wellness at staff development days demonstrates systemwide support for school employee wellness. The program can include motivational speakers, health assessments accompanied by resources to prevent or address health risks, or opportunities to engage in health-promoting behaviors such as physical activity and healthy eating. A staff wellness day at Ridgewood Public Schools in New Jersey focused on stress management and physical fitness. Health and physical educators provided stress management techniques, step aerobics, and physical assessments, including muscular strength and endurance, cardiovascular endurance, physical activity, and nutrition inventory. The physical assessments helped participants establish a baseline for a resting heart rate, identify appropriate personal exercise programs, and “walk” through various exercise programs.

"Staff liked the immediacy of the pedometers. Walking provided social support for the teachers before, after, and during school and the kids participated, too. I was unprepared for the positive reception this intervention received - how excited and receptive they were. There was very high interest in the pedometers. Pedometers were a big motivator."

— Robin Atwood, University of Texas at Austin

Initial activities can be based on survey findings. Because stress is high on many school employees’ list of health concerns, you might want to start with stress management. Other popular start-up activities include distributing pedometers to promote walking (10,000 steps a day), organizing walking teams or clubs, offering assistance with smoking cessation or weight management, distributing water bottles, and providing healthy snacks. Activities might also include first aid, safety, or CPR training; medical self-help information; healthy nutrition recipe clubs; promotion of seat-belt use; or immunizations. The options are limited only by your imagination.
In Rock Hill, South Carolina, a school district incorporated discussion of emotional and health issues into monthly staff development for new teachers. In addition to examining topics such as academic standards, long-range planning, and innovative teaching strategies, new employees were introduced to the importance of wellness topics such as stress relief, walking and physical activity, adequate hydration, and helping themselves and students cope with loss.

Establish a Yearly Cycle of Activities Based on a Monthly Theme

A yearly activities cycle might be based on events that occur in the course of the school year such as returning to school, exam week, preparing for holidays, and getting ready for summer, or they might revolve around national health observances. National health observances, along with links to resources for promoting them, are available on the Healthfinder website (www.healthfinder.gov/library/nbo/). Examples of national health observances can be found in the Useful Tools for School Employee Wellness Programs section of this guide.

Organize a Health Fair

Organizing a health fair can be labor intensive. On the other hand, it can be an opportunity to engage students and address a number of program goals such as the following:

- Raising awareness and educating participants through literature distribution and talking with employees at booths;
- Testing health-promoting practices with employees who might use them;
- Screening for health risk factors and surveying for health program interests or readiness; and
- Involving community resources, which increases community visibility and builds a base for continued support and partnership.

However, one of the pitfalls of using a health fair to start school employee wellness activities is that some districts regard it as an end in itself rather than as an element of an overall program.

CDC developed The Guide to Community Preventive Services, which summarizes what is known about the effectiveness, economic efficiency, and feasibility of interventions to promote community health and prevent disease. One of the many topics in the guide is worksite health promotion, including tobacco use, nutrition, physical activity, and assessment of health risk. The reviews in the guide provide recommendations on worksite-specific policies and activities that can help employers choose among those health-promotion program components that have proven effective in changing the behavior and improving the health of employees. Individuals implementing school employee wellness activities will find the community guide very useful. It can be found online at www.thecommunityguide.org.

Step 8: Evaluate and Adapt the Program

Evaluation can help to identify needed changes, find out how well objectives are being met, determine the effects of the program, and identify ways to improve the program. Planners should decide who will conduct the evaluation and work with the evaluator to develop an evaluation plan. To ensure an objective and unbiased evaluation, the evaluator should be someone who is not involved in program planning or implementing program activities.

Evaluation starts when the program is established, with needs assessments and surveys that provide a baseline for measuring progress. This type of evaluation is called “formative evaluation.”

To improve the process of implementing a school employee wellness program, data about program implementation strategies and participant response must be gathered. Questions to evaluate the program's process might include the following:
Does the program offer health education tailored to employees’ needs and interests that focuses on skill development and lifestyle behavior change along with information dissemination and awareness building?

Are the social and physical environments supportive, including the district’s expectations about healthy behaviors and implementation of policies that promote health and reduce the risk of disease?

Is the school employee wellness program integrated into the district structure?

Are programs such as employee assistance programs and programs that help employees balance work and family in place?

Are screening programs offered? If so, are they linked to risk-reduction activities or medical care to ensure follow-up and appropriate treatment as necessary?

Does the school employee wellness program offer follow-up interventions to support individual behavior change?

Are education and resources offered to help employees become better consumers of health care?

Is an evaluation and improvement process in place to help enhance the program’s effectiveness and efficiency?

A tool called “How Is Our School Employee Wellness Program Doing?” is included in the next section of the guide; it can help assess the process of implementing a school employee wellness program.

Outcome evaluation measures a program’s impact. Questions that focus on the impact or outcome of the program could include the following:

How much has tobacco use decreased?

Have health risks such as high cholesterol and excess weight decreased?

Has employee absenteeism due to illness or injury (separate from absenteeism due to jury duty or family emergencies) decreased?

What evidence is there of documented lifestyle changes?

Has there been a cost benefit or positive economic effect (e.g., reduced health care costs, reduced spending for substitute teachers, fewer workers’ compensation claims)? What is the difference between the cost of the program and the outcome of the program in dollars? What is the cost-to-benefit ratio of the program?

Were employees’ health needs met?

Employees who change behaviors reduce health risks and have fewer health care needs. Program evaluations can look at behaviors like tobacco use, healthy eating, and physical activity as measures of program effectiveness. Improvements in body composition, blood pressure, blood cholesterol, and blood glucose are just a few of the risk measures that can improve as a result of your school employee wellness program.

Perhaps the single outcome that can build support for or call into question employee wellness programs is financial impact. In an environment of tight budgets, any school employee program that can show a positive return on investment will likely be long-lived. Evaluating the financial impact of a school employee wellness program may provide the information administrators need to justify wellness efforts.

The best financial outcomes data should be presented in a manner that compares the total costs of the program with the total financial benefits of the program. This is called a cost-to-benefit ratio. Financial benefits are the amount of money saved from reduced health care costs and absenteeism.

Evaluation is not an end in itself. The findings can help to identify what works and what needs to be changed. The school employee wellness leader should work with the school employee wellness committee, the district school health council, and the administration to interpret data and make modifications. This will ensure that the program continues to meet the needs of the population it is intended to serve and that it becomes more fully integrated into institutional functioning.
Step 9: Sustain the Program

“I present a state of the wellness program report to the school board annually. It just blows them away. If they consistently see a successful program, they will continue to support it . . . And every 4-6 weeks I write an article and call the reporter for the local newspaper. He puts it in under his byline. I invite the local TV stations to come out and see what we are doing. They love it and the administrators love it because the community sees them in a good light.”

— Sherry Franks, Coordinated School Health Program, Washington County Schools, TN

Maintaining the support of administrative leadership and the school board is crucial for the continued development and sustenance of a school employee wellness program. The following ideas may help sustain the school employee wellness program and maintain the support of the administration:

- **Invite administrators to attend school employee wellness committee meetings.** Solicit their opinions and feedback, and encourage them to participate in school employee wellness activities. They are subject to the same health risks as other employees; moreover, their participation sets an example and demonstrates the district’s commitment to the program.

- **Develop clear procedures for communication.** Determine how administrators prefer to receive information and provide feedback. Make sure your administration is aware of potential problems, and solicit administrative input to solve problems.

- **Through appropriate channels, request an opportunity to meet with the school board at least once a year.** At the meeting, be prepared to demonstrate how an investment in school employee wellness is money well spent and money saved. Provide data about the link between school employee wellness activities and your district’s goal of preparing students to become educated, productive citizens. Summarize process evaluation data about school employee participation in program activities and anecdotal evidence of successes that substantiate the appropriateness of and need for the program. If time permits, invite employees to present testimonials about how they have benefited from the program. Comply with guidelines about oral and written communications to school board members, especially time limits and brevity. (NOTE: Most school districts have protocols that employees should follow to communicate with the school board.)

- **Make recommendations to the school board.** Be prepared to demonstrate how recommendations are consistent with your district’s mission, goals, and policies. Report on the actions you have taken in response to feedback from policymakers.

- **Revise or update policies as the program evolves.** Be prepared to work with your administration to suggest policy changes. Provide the board with information about the benefits of the recommended policy changes, the links between the policy recommendations and current district policy, and examples of policies from other districts.

- **Evaluate the program regularly and keep policymakers informed.** Provide information on employee participation in fitness activities, decreases in health risks such as tobacco use and cholesterol levels, decreases in employee absenteeism due to injury and illness, cost benefits that can be documented, and similar outcomes. Make sure policymakers understand the objectives of the school employee wellness program and progress toward those objectives.

- **Develop a visual record of the program.** Maintain a binder with items such as photographs, awards, and statements of appreciation and recognition. Keep it in a visible place where it is likely to been seen. Post promotional bulletin board displays in high-traffic areas. Keep your district’s media liaison or public relations officer informed of events, new data, and achievements.
CONCLUSION

The economic, social, and personal benefits of promoting health in the workplace are clear. Health promotion in schools holds the promise of an even greater impact than health promotion at other worksites. As one of the nation’s largest employers, school districts reach more than 6.7 million adults. Through these adults, they have the potential to affect the academic achievement and well-being of the more than 54.7 million students who pass through the school doors every day. A school employee wellness program, as an integral and equal component of a coordinated school health program, can be key to maintaining a healthy, optimistic environment where students and employees thrive. Although implementing a school employee wellness program can be complex and demanding, those who have pursued its development found that the rewards far outweighed the challenges.

“Time consuming as it has been, it is rewarding to see the improvement in employees’ fitness and morale. It is a win-win program. If you believe in the process, go for it.”

— Michelle Burke, School Health Coordinator, Hudson Falls Central School District, NY