



Gaining Workplace Health Promotion Knowledge and Skills that Follow You Wherever You Go: Case Study

Participating in CDC's Work@Health® Program

When Justin Carlton was hired by Cherokee Nation Businesses in 2013, he was charged with developing a worksite wellness program. As part of his search for resources in Oklahoma, Carlton contacted the Tulsa and Oklahoma City health departments and the Centers for Disease Control and Prevention (CDC). There he learned about the

[Work@Health®](#) program and was selected to participate in a hands-on training session in May 2014 in Chicago, Illinois.

With training and effort, employers of all sizes and types can plan and implement a workplace health program. Employers can learn from the experiences of Work@Health® participants like Justin Carlton about how to plan strategies and anticipate implementation challenges.

The Work@Health® program is designed to teach employers how to improve the health of their workers (and workers' families) by using prevention and wellness strategies that focus on chronic health conditions. Well-designed,

science-based, and comprehensive workplace wellness programs can improve the health of individuals and companies, lower health care costs, and increase worker productivity.

After the training, participants received 6 to 10 months of technical assistance in the form of coaching, webinars, and interactions with peers. Carlton said he found the webinars, tool kits, and templates provided by his coach helpful, especially the information on how to set up wellness committees to plan and put programs into place. He found his Work@Health® coach to be proactive and resourceful. Carlton noted that having the Work@Health® tools saved him time and effort and allowed him to focus on his organization's needs.

Applying New Knowledge on the Job

Carlton launched his organization's wellness program shortly after the Work@Health® training. His employer, a business in the hospitality industry with multiple locations, had few previous health initiatives. During the first year, Carlton put his knowledge into practice by gathering support at all levels, including from employees and top-level executives. He also used data from employee health assessments and interest surveys to strengthen the business case for worksite wellness.

Trainee Background

Work@Health® Training Participant:
Justin Carlton, MB

Location: Catoosa, Oklahoma

Role: Former Project Manager with Cherokee Nation Businesses; currently a State Farm Broker.

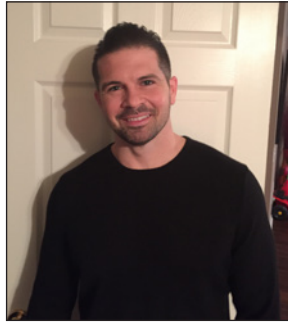
Years of worksite health promotion experience: 3

Justin Carlton's educational background in business and marketing prepared him for his previous roles as a small business owner and marketing professor. Although he had little exposure to workplace health promotion and wellness before 2013, he explained that he had always had a passion for health and well-being. This passion served as a catalyst for setting up new wellness programs for his employer in the hospitality industry and for his next business venture.



Cultivating Champions

Although he had no dedicated budget for his wellness program, Carlton spent several months cultivating wellness champions at each of his employer's 10 worksites. He used face-to-face meetings with employees at each location to develop relationships with people who were interested in supporting his efforts. Some employees approached him directly and asked to serve as champions, while others were referred to him.



*Work@Health® Training
Participant Justin Carlton.
Photo provided by Justin Carlton.*

Carlton worked with the champions to set up wellness committees at each worksite, and the champions served as leaders of these committees. The committees were charged with developing and leading health promotion activities at their worksites. Carlton encouraged worksites to have co-champions to avoid turf issues and share responsibility among multiple people. Carlton served as an advisor to the champions and worked with them to generate enthusiasm and momentum for wellness activities at their locations.

Carlton also created a champion committee of all the local worksite leaders that met monthly. He encouraged the individual committees to meet regularly and to set up a formal process for how they would operate. He used tools from the Work@Health® training, and the [CDC Worksite Health ScoreCard](#) to help the committees collect baseline data in 2014 about health and wellness activities at their locations and to assess employee needs and interests. He also created structured opportunities for committee members to work on, such as collecting survey data and piloting wellness initiatives at their locations.

Conducting a Baseline Assessment

Carlton helped the wellness committees conduct their 2014 employee health assessments. Health assessments were conducted at each worksite to reduce travel and time barriers. Each participant completed a health survey and biometric screening. To ensure privacy, results were mailed to employees'

homes. Carlton compared aggregate data from a health assessment conducted by his employer in 2012 with the 2014 results to identify health issues affecting high numbers of employees.

Carlton also developed a detailed employee interest survey that he adapted from Work@Health® materials and a similar survey from the Oklahoma City Health Department. Results indicated strong interest in healthier food options and on-site gym access. Carlton used the results to build a case for a wellness program to present to the company's leadership. This presentation combined information on the areas of need identified by the health data and on the changes that employees said they would support.

Marketing Wellness and Making the Business Case

Because of his marketing background and Work@Health® training, Carlton knew how to design effective communications. He focused on creating a recognizable brand that could be used to market wellness activities and get the attention of employees. He enlisted the help of the marketing department to develop a program brand and write a communications plan. He made brief presentations about the results from the health assessment and employee interest surveys to the wellness committees and to the company's leaders. As a result of his efforts, he was able to get an annual budget for a wellness program.

Employers selected to participate in Work@Health® were assigned to one of three models, all of which delivered the same comprehensive workplace health curriculum.

1. The hands-on model was an on-site, instructor-led one-day training workshop held in one of six regional locations.
2. The online model allowed employers to move through the curriculum independently over several weeks using a web-based learning platform.
3. The blended model included a combination of hands-on and online learning strategies.

Developing a Tailored Program

The Work@Health® program stresses the importance of using different types of strategies—such as programs, policies, and environmental supports—to increase the ways that employees can participate in health promotion activities. Because individual employees have different needs and preferences, a one-size-fits-all approach typically does not work. Work@Health® also encourages careful planning before implementation to avoid pitfalls associated with trying to do too many things at once.

Carlton planned pilot launches of different strategies at single locations to make sure they worked before trying them at other worksites. For example, he worked with the cafeteria vendor at one worksite to offer more healthy food and drink options. At another location, he and the wellness committee set up a community supported agriculture program with the Oklahoma Food and Farm Alliance. This program gave employees the opportunity to buy a monthly or biweekly box of fresh produce delivered by local farmers.

Internal Partnerships

Because the workforce at the company where Carlton worked was culturally diverse, he sought feedback from employees at all levels to ensure that program materials and messages were culturally relevant and tailored to employee needs. He knew that being part of a large, diverse organization was an advantage he could leverage to develop a wellness program. He discovered that identifying internal resources and experts not only helped program development, but also increased employee buy-in and engagement. Carlton recruited clinical staff, dietitians, and public health educators from within the company to offer training, education, and on-site clinical preventive services. These health professionals helped the members of the wellness committees think of things they might not have otherwise—like the connections among stress, physical activity, and healthy eating.

Evaluating Progress

The importance of evaluation is a consistent theme of the Work@Health® program, from building evaluation into the planning process to continually improving the quality of program offerings on the basis of evaluation results. To measure progress, Carlton

developed metrics to track short- and long-term changes over time, including the following:

- Participation rates.
- Program satisfaction.
- Employee interest and readiness to make behavior changes.
- The number and type of evidence-based strategies in place.
- Employee turnover rates.
- Sick, family, and medical leave days taken.
- Top-selling items in vending machines and cafeterias.
- Major physical and mental health problems.
- Pharmacy claims.

Carlton's initial approach was to track as much information as possible to avoid missing data that might turn out to be important. Over time, he began to see which indicators were most meaningful. He also said it was helpful to have data available to show progress to company leaders who were struggling to see the value of a wellness program.

Bringing Workplace Health to a New Business

An entrepreneur at heart, Justin eventually left his large employer and opened his own small business. He made employee health one of the cornerstones of his new venture. He is using evidence-based strategies to build his new wellness program, with the goal of being recognized as an [Oklahoma Certified Healthy Business](#). Although the budget for the program will be small, Carlton said he has learned from Work@Health® the importance of collecting information about employee needs and interests to plan the program. He also learned that community partnerships can be used to leverage resources and that many strategies can be put in place for little to no cost (e.g., organizational policies that promote health).

Carlton said he also plans to focus on creating a healthy workplace culture, which he knows can have a far-reaching benefit. For example, he plans to encourage employee feedback, input, and professional development and to offer activities that promote teamwork and trust. He will incorporate flexibility for health and work-life balance into

organizational policies by allowing each employee a 90-minute lunchbreak to use for exercise or other wellness activities. He will bring in a vendor to provide on-site primary care services for employees, including full blood panel health assessments followed by counseling. Another flexible work policy will allow employees to work from home on a rotating basis to recognize the importance of family time.

Carlton has also applied his knowledge about health promotion programming to improving health in his community. As a member of the Tulsa County Pathways to Health Board of Directors, he is collaborating with public health agencies and the private sector to make progress toward the board's goal to "make the healthy choice, the easy choice" for everyone in the Tulsa area.

Learning from Work@Health®

In a survey after the training in Chicago, all of the participants said they would be able to use what they had learned at their jobs. Ninety-three percent said they understood how to apply what they had learned at their jobs, and that they would recommend the Work@Health® training to others in their position. After they completed the technical assistance portion of the program, participants were asked to list the top three lessons they had learned.

Carlton said he had learned the following:

1. You must have leadership support.
2. Proper planning and organization are essential to successful execution.
3. Committees are a powerful tool, but you need resources to add substance.

About 6 months later, participants were asked to complete surveys about what they had done with the

information they had learned in the training. Seventy-one percent said they had shared the information with others in their organizations, and 64% had developed worksite health plans.

How Work@Health® Trainees in the Chicago, IL, Hands-On Model are using the Information They Learned in the Program



Challenges

When he was gathering support for worksite wellness at his previous employer, Carlton realized that the culture and nature of work at each worksite affected employees' level of engagement. Some sites had less flexibility for employees to participate in wellness activities. Most operated multiple shifts every day, which meant that program activities needed to be available more than once a day. Although Carlton found that attitudes about worksite wellness improved over time, some managers remained skeptical about whether their employees really wanted to adopt healthier lifestyles. These managers wanted to see the data to support changes and ensure that participation was worth their time. Carlton made sure this data was available.

"Work@Health® not only provided me with superior content, but it provided direction. So many organizations, both large and small, don't know where to even begin. Work@Health® solves this problem."

—Justin Carlton

Carlton also found that some health policies, like time off for physical activity, can be difficult to implement in a large, customer-focused organization. Persistence, flexibility, and compromise were needed to survive the multilayered approval process and find a plan everyone could support.

Ultimately, the hardest challenge for Carlton was sustaining top leadership support and resources for the new wellness program. Some investment is required to put in place a science-based health promotion program that can work. Managing leaders'

expectations about what the program could achieve and the amount of time needed for change to take root and become established are lessons that Carlton will take with him moving forward.

What's Next?

Carlton has big plans to set up a wellness program at his new company that will foster a culture of health. He intends to take the steps needed to become an Oklahoma Certified Healthy Business. He is focusing energy on creating a healthy worksite because he believes it will attract and keep talented employees. It also will allow his business to serve as a role model for other small businesses.



The Work@Health® employer-training program is an initiative of the U.S. Centers for Disease Control and Prevention (CDC) to promote workplace wellness through employer education, training, and technical assistance. Work@Health® training provides employers with knowledge and tools through a comprehensive curricula to promote good health in their work places to prevent or reduce chronic illness and disability, and improve productivity.