



MAKING IT WORK

with Active Living in the Workplace

ABOUT THIS MANUAL

You will find this manual useful if you are:

- an active living leader in the workplace
- an individual working in the areas of human resources, occupational health and safety, or any enthusiastic employee who wants to "get the ball rolling" towards achieving a healthier workplace
- a manager or employee who has been given the responsibility to start an active living initiative in the workplace
- a manager of an existing employee program undergoing revision to take on an active living approach.

The information offered in this manual assumes you have been given the go-ahead from your management to begin the exciting task of designing and implementing your active living initiative.

HOW TO USE THIS MANUAL

Making It Work! is a "how to" workbook for those in the preliminary stages of program planning and development. It is designed to introduce practical ideas to help you and your organization develop new perspectives and create effective approaches to active living. Each chapter has been designed to stand alone. This allows you to choose the sections most applicable to your situation.

CHAPTER 1

Building Foundations includes the steps necessary for securing a strong base for your initiatives.

CHAPTER 2

Human Resources Development and Leadership provides guidelines to support the evolving needs of workplace leaders.

CHAPTER 3

Program Planning gets down to the basics of program management and administration.

CHAPTER 4

Program Mix is a chapter chock-full of ideas.

CHAPTER 5

With so many great program ideas, the real key to tailoring and targeting your efforts is through successful **Marketing and Promotion**.

CHAPTER 6

To **Carry On** the momentum of an active living program, you need to motivate participants to adhere to their new active lifestyle. You also need to monitor participants in order to evaluate how well they remain with the program.

This manual has been designed to cover the basics, therefore much of the material has been simplified.

This book is not a manual of "must-do's." It is your active living program of useful information from which to pick and choose. What you do with the material will depend entirely on type of active living initiative you choose to create. Pick what best fits the needs of your company and enjoy the benefits of active living in the workplace.

Table of Contents

| | |
|--|----------------|
| INTRODUCTION | Page 1 |
| AN ACTIVE LIVING APPROACH | Page 1 |
| ACTIVE LIVING IN THE WORKPLACE | Page 2 |
| | |
| 1. BUILDING FOUNDATIONS | |
| 1.1 PROGRAM PHILOSOPHY AND SCOPE | |
| MISSION STATEMENT | Page 4 |
| ESTABLISH GOALS AND OBJECTIVES | Page 4 |
| EXAMPLES OF GOALS AND OBJECTIVES | Page 5 |
| | |
| 1.2. THE CORPORATE CULTURE AUDIT | Page 6 |
| CHANGES TO THE WORK ENVIRONMENT | Page 6 |
| CHANGING CULTURAL NORMS | Page 7 |
| THE ACTIVE LIVING CHALLENGE | Page 7 |
| | |
| 1.3 ACTIVE LIVING IN THE ORGANIZATIONAL STRUCTURE | Page 8 |
| | |
| 1.4 EMPLOYEE INVOLVEMENT | |
| THE CHANGING WORKPLACE | Page 10 |
| EMPLOYEE ADVISORY COMMITTEE | Page 11 |
| | |
| 2. HUMAN RESOURCE DEVELOPMENT AND LEADERSHIP | Page 14 |
| 2.1 VOLUNTEERS AND VOLUNTEER LEADERS | Page 14 |
| RECRUITMENT AND SELECTION | Page 14 |
| ROLES AND RESPONSIBILITIES | Page 15 |
| GETTING THE BEST OUT OF YOUR VOLUNTEERS/HUMAN RESOURCES | Page 15 |
| SUPPORT STAFF | Page 17 |
| | |
| 2.2 PROFESSIONAL LEADERSHIP | Page 18 |
| WHAT TO LOOK FOR | Page 18 |
| WHERE DO YOU FIND PROFESSIONAL LEADERSHIP? | Page 18 |
| INTERNAL STAFF | Page 19 |
| | |
| 3. PROGRAM PLANNING | Page 20 |
| 3.1 INTERNAL AND EXTERNAL RESOURCES | Page 20 |
| A. INTERNAL RESOURCES | Page 20 |
| B. EXTERNAL RESOURCES | Page 20 |
| | |
| 3.2 POLICY DEVELOPMENT | Page 22 |
| | |
| 3.3 FINANCIAL PLANNING | Page 24 |
| | |
| 3.4 EVALUATION AND RECORD-KEEPING | Page 27 |
| COMMON GOALS | Page 27 |
| EVALUATION DESIGN | Page 28 |
| KEEPING RECORDS | Page 29 |
| | |
| 4. PROGRAMS MIX OPTIONS | Page 30 |
| 4.1 AWARENESS | Page 30 |
| ADVERTISING | Page 30 |

| | |
|--|----------------|
| DESIGNING EFFECTIVE MATERIALS | Page 30 |
| SLOGANS AND LOGOS | Page 31 |
| BULLETIN BOARD AND POSTER DISPLAYS | Page 31 |
| ORIENTATION ACTIVITIES..... | Page 31 |
| NEWSLETTERS..... | Page 31 |
| THEME AND SEASONAL CAMPAIGNS..... | Page 31 |
| 4.2 EDUCATION..... | Page 32 |
| MINI LECTURES..... | Page 32 |
| RESOURCE CENTRE..... | Page 32 |
| SCREENING AND ASSESSMENT PROGRAMS | Page 32 |
| SOFTWARE PROGRAMS | Page 33 |
| 4.3 SKILL DEVELOPMENT | Page 33 |
| DEMONSTRATIONS AND WORKSHOPS..... | Page 33 |
| DEMONSTRATION IDEAS | Page 33 |
| EDUCATIONAL RESOURCE SUPPLIERS..... | Page 34 |
| 4.4 GROUP AND SOCIAL ACTIVITIES..... | Page 35 |
| STRETCH BREAKS | Page 35 |
| WALKING PROGRAMS | Page 35 |
| CONTESTS/CHALLENGE EVENT | Page 35 |
| SPECIAL EVENTS | Page 35 |
| 4.5 SUPPORTIVE ENVIRONMENT | Page 36 |
| OFF-SITE FACILITIES | Page 36 |
| ON-SITE FACILITIES | Page 37 |
| SUBSIDY PLANS | Page 37 |
| INCENTIVES | Page 38 |
| SOCIAL SUPPORT | Page 38 |
| 5. MARKETING AND PROMOTION | Page 40 |
| 5.1 SOCIAL MARKETING TIES TO ACTIVE LIVING..... | Page 40 |
| 5.2 PLANNING AND DEVELOPING YOUR SOCIAL MARKETING STRATEGY..... | Page 40 |
| 5.3 TARGETING THE “HARD-TO-REACH” | Page 42 |
| A. SENIOR AND MIDDLE MANAGEMENT | Page 42 |
| B. BLUE COLLAR WORKERS..... | Page 43 |
| C. SHIFT WORKERS..... | Page 43 |
| D. MULTI-SITE LOCATIONS | Page 43 |
| E. OLDER WORKERS AND RETIREES..... | Page 44 |
| F. WORKERS WITH A DISABILITY | Page 45 |
| G. FAMILIES..... | Page 45 |
| 6. CARRYING ON | Page 47 |
| 6.1 MAINTAINING MOMENTUM: (MOTIVATION AND ADHERENCE)..... | Page 47 |

APPENDICES

| | | |
|----|--|---------|
| A. | CREATING A MISSION STATEMENT | Page 49 |
| B. | THE CORPORATE CULTURE AUDIT | Page 51 |
| C. | CULTURAL NORMS TEST | Page 53 |
| D. | MONTHLY OPERATING BUDGET | Page 54 |
| E. | TERMS OF REFERENCE FOR ACTIVE LIVING VOLUNTEERS..... | Page 55 |
| F. | JOB DESCRIPTION: ACTIVE LIVING PRACTITIONER | Page 57 |
| G. | 12-MONTH THEME CALENDAR..... | Page 62 |
| H. | FITNESS TESTING INFORMATION | Page 65 |
| I. | ACTIVE LIVING CHALLENGE | Page 67 |
| J. | SOCIAL MARKETING STRATEGY | Page 69 |
| K. | EVALUATION SURVEYS: PRE-ACTIVITY, POST-PILOT PROJECT | Page 71 |

INTRODUCTION

WHO ARE WE?

The Canadian Council for Health and Active Living at Work (CCHALW) is a volunteer-driven, not-for-profit organization that provides leadership and support to those Canadian active living and health-promotion professionals specifically striving to create healthier workplaces.

Working on a project-by-project basis, Council members live and work in various parts of Canada.

The Council was originally conceived in the 1980s by the Workplace Fitness Unit of the now-defunct Fitness Canada department to meet the growing needs of a relatively new health field.

At that time, there was tremendous growth in on-site corporate fitness facilities and 'wellness' was becoming a familiar term in the workplace.

Health and active living professionals soon began looking for resources to help them get companies on-side with this trend that not only benefits employees but can also help boost an organization's bottom line in the process.

Today, the CCHALW maintains a strong partnership with Health Canada's Physical Activity Unit and collaborates with many other organizations to develop unique initiatives and provide resources like this one that promotes health and active living in the workplace.

AN ACTIVE LIVING APPROACH

Why Active Living at Work?

It makes good business sense. It makes for healthier employees and helps to reduce crucial costs of doing business and makes business more competitive. It helps to improve employee morale and productivity.

Good workplace practices, including things like access to physical activity in the workplace and cafeterias with healthy options, are increasingly important to an organization's success.

Organizations draw the best and the brightest of the workforce if they provide these types of optimal working conditions.

Sixteen million Canadians spend one-half of their waking hours at work. As a consequence, it is vital to find ways of increasing physical activity at and around work.

The majority of Canadians are sedentary at work. Their health risks are increased if they are also sedentary in their leisure time.

Canada's workforce is aging. Benefit costs and absenteeism will likely escalate if older workers do not increase their physical activity levels.

Canadians cite physical activity as one of the means by which they intend to improve their health.

Workers report that physical activity is a means by which they can reduce stress. Stress is playing an increasingly important role in workplace illness and sick days.

Workers are reporting increased levels of stress.

According to companies that have introduced active living policies, they make good business sense - the 2003 CFLRI survey of over 1700 Canadian businesses highlighted the perceived benefits of implementing active living programs.

The Benefits of Physical Activity

The fact that physical activity accrues many benefits has long been established. Those who participate in regular physical activity report:

- better health
- improved fitness
- better posture and balance
- higher self-esteem
- weight control
- stronger muscles and bones
- feeling more energetic
- relaxation and reduced stress
- continued independent living in later life

Perceived Economic Benefits of Active Living Programs

Reduced absenteeism and increased productivity – approximately 75% of employers consider these to be key benefits in the implementation of a physical activity program.

Reduced health care costs – 67%

Reduced number of accidents – 46%

Reduced workers' compensation claims – 45%

Incentive to recruitment – 40%

ACTIVE LIVING IN THE WORKPLACE

. . . offers choices for a variety of opportunities and personal benefits.

By including all forms of physical activity, active living offers a wide range of participation opportunities by providing employees with more choice in deciding the nature and type of activity that's best for them. Even moderate amounts of physical activity reduces the risk of heart disease.

. . . can help employees strike a balance in their lives.

Sharing of leisure time makes the strongest contribution to family bonds for those balancing work and family needs. It can help employees take charge of their lives, and increase their ability to cope. Active living programs can also help support the family unit by involving employees' families. The work-family balance is now recognized as a major and positive factor in effective work performance.

. . . is focussed on spaces, not places.

A company doesn't need to build expensive facilities, or buy high-tech equipment. Making use of worksite property, or collaborating for the use of neighbouring parks and community facilities, can help keep costs down.

. . . supports activities which value and protect the natural outdoors.

Employees want to do something for the environment. When a company demonstrates a commitment to "environmental citizenship," employee support will be positive and enthusiastic.

. . . invites all employees to take part.

Active living includes opportunities to participate for employees with a disability, employees on shift work, those at satellite locations or downtown offices, the active and the not-so-active, younger

workers and older workers, and multi-cultural groups.

. . . can promote communication amongst working groups.

Social interaction through recreation breaks down unfamiliarity and isolation and promotes contact between different groups within the workplace. Companies benefit by having a workforce that is more positive, works co-operatively, and is more committed.

. . . contributes to life satisfaction and social integration.

Active living provides an opportunity to experience a sense of spirituality which may affect the individual in ways that involve the capacity for introspection, humility and feelings of belonging.

. . . succeeds through partnerships.

Active living encourages people and groups to work in new and collaborative partnerships to create and achieve a vision of improving the quality of life within the corporate environment, within the family and the broader community.

Imagine . . . what will active living in your workplace look like? Make It Work! will take you down the path to achieving your vision of active living in the workplace.

1. BUILDING FOUNDATIONS

1.1 PROGRAM PHILOSOPHY AND SCOPE

THE MISSION STATEMENT

The function of a mission statement is to guide the process and progress of your entire active living initiative; it should not be over-looked or skimmed over quickly. Everyone should contribute to its development. Blend in the results of the employee survey and seek input from top-level management. The involvement process is as important as the written product and is the key to its use.

The mission statement provides an obvious link to the company's mission statement, reflecting the shared visions and philosophical values of everyone within the organization. Your program's mission statement can create a frame of reference and a set of criteria or guidelines by which the participants will govern themselves. Be prepared to look back on the mission statement from time to time, and make modifications to suit changes to your program and within the organization.

An example of an active living mission statement:

"To create a workplace environment which encourages employees to incorporate physical activity into their daily routine, and which values active living as an essential part of both personal and corporate well-being."

Refer to the Appendix A worksheet to help you create a mission statement for your active living program.

ESTABLISHING GOALS AND OBJECTIVES

Once your mission statement process is completed, it is time to get more specific by developing goals and objectives. Follow these three steps:

Step One:

List the overall goals of your program, making sure that these are clearly understood and widely shared. Keep in mind that integrating active living takes time and resources. Changing attitudes and behaviour is a complex process, so you will need short-, medium- and long-term goals.

Step Two:

Determine and write down the objectives within those goals. A basic format for writing goals and objectives is: "To (action verb) (single key result) by (target date), requiring (what organizational resources).

Step Three:

Give your goals and objectives the **SMAC** test.

S Is it specific?

Does it specifically state where, how, when, why and who?

M Is it measurable?

Does it include how much time you must give to reach it?

A Is it action-oriented to produce results?

Is it achieved through a participatory process?

C Is it compatible with your other objectives, your ultimate goal, the resources available, and the

organization's goals?

EXAMPLES OF SHORT-, MEDIUM-, AND LONG-TERM GOALS AND OBJECTIVES

1. **Short-term Goal:**
To develop and/or acquire quality programs and services based upon the principles of active living.

Objectives:

1.1 To facilitate the delivery of leadership training for active living volunteers and advisory committee members by _____(date)_____.

1.2 To develop a plan to market programs and services to all employees by _____ (date)_____.

2. **Medium-term Goal:**
To build trusting partnerships with key stakeholders in order to plan, develop, implement and evaluate programs and services.

Objectives:

2.1 To organize two meetings a year, in January and September, with designated departments, union executives, special interest groups, and community organizations, for the purpose of sharing information and diminishing overlap of activities.

3. **Long-term Goal:**
To promote the continuing development of a workplace that values active living.

Objectives:

3.1 To evaluate each active living initiative upon completion to demonstrate program effectiveness and to present a summary report from the advisory committee to senior management.

1.2. THE CORPORATE CULTURE AUDIT

Successful active living programs depend on a working environment that physically, psychologically and socially supports active living within the organizational structure. All of this is crucial in building the foundation of a culture which supports active living.

Employees must not only feel that physical activity is beneficial, but that their company encourages them to make active living choices at work and at home. Unless this feeling is woven into the fabric of the corporate culture, active living initiatives will constantly struggle for support and participation. Try the Corporate Culture Audit in Appendix B to see how active living fits into your workplace.

Strong foundations for active living in the workplace can be seen in:

- A) a commitment to make changes in the work environment that support active living;
- B) changing cultural norms such as employee beliefs, values, expectations and behaviour norms towards positive attitudes which support active lifestyles; and
- C) a willingness to integrate active living into the workplace; that is, to accept the "active living challenge."

A. CHANGES TO THE WORK ENVIRONMENT

The corporate culture itself exerts a powerful influence on the success of participation in active living. Employees must not only feel that they will benefit from their active living efforts, but that their company will make changes in the work environment which will encourage them to make active living choices at work and at home.

Check to see if any of the following changes can be made in your work environment to support active living:

- Making existing shower facilities available to exercisers for changing
- Marking distances on walking trails near the workplace and distributing a map of suggested break-time walks to employees
- Scheduling regular family recreational events at the workplace
- Providing corporate discounts for a variety of sport, recreational and fitness opportunities in the community
- Encouraging special interest/support groups who regularly meet for an activity such as gardeners, golfers, walkers, ex-smokers and weight-watchers
- Promoting regional or national active living activities that support charities, or developing your own fund-raising events
- Revising health and safety guidelines to address ergonomic concerns
- Improving air quality and decreasing background noise by, for example, muffling equipment
- Offering "return-to-work" rehabilitation programs for injured workers
- Providing alternate work schedules; for example, a restructuring of personnel policies so employees have flexibility to take their breaks when they need them (flex-time for active living breaks), and flexible work arrangements to help those balancing work and family
- Encouraging alternative transportation by providing bike parking, showers, lockers, and attractive stairwells
- Offering fresh air and open spaces.
- Providing water coolers

As the coordinator of your active living program, you may not be able to change or influence aspects of the corporate climate or system yourself. However, you can influence other decision makers and departments more closely associated with such matters. You can be an informed and persuasive advocate for the kind of changes that will support active living in the workplace.

B. CHANGING CULTURAL NORMS

We can consider the workplace as a culture made up of smaller subcultures or groups such as the boardroom, individual departments, and the office unit. Each group has a set of shared expectations, or norms. These norms are powerful determinants of what people do.

These norms can be either positive or negative. In relation to an active lifestyle, they can either contribute to or detract from well-being. With your workplace in mind, complete the Active Living Cultural Norms Test found in Appendix C.

Norms can be changed. Because social standards are so powerful in shaping long-term behaviour, they should be a central focus of your active living program. We need to choose the cultural norms which best support peoples' efforts to live active lifestyles.

C. THE ACTIVE LIVING CHALLENGE

We believe that your active living initiatives can succeed most completely by going beyond programs that rely on the modification of health behaviours of individuals. The active living concept will challenge you to examine and ultimately to modify all organizational structures which have a significant effect on employee health.

A vision exercise

Take the time to sit down with employee focus groups and have them imagine what the ideal active living workplace looks like. What are people doing? How are they talking to each other? What noises do they hear? What smells come out of the cafeteria? What tangible evidence is there to judge a healthy workplace? Use the vision of your groups to create your own.

By closing the gap between existing and desired norms, individuals can work together to create organizational environments and norms which support active living. Imagine a workplace where being active is the norm, where all employees can participate in physical activities of their own choosing and where the culture is responsive to the changing needs of its workforce. This is the active living challenge.

We recognize that by issuing this challenge to your active living strategy, we are addressing concerns that may be well beyond the authority of this kind of initiative. One of our goals throughout this manual is to encourage you to think about active living in both accepted and novel ways, especially if novel approaches can realize program objectives. This approach requires linking all organizational activities that influence health and encouraging as many people as possible to become advocates for promoting active living. To be most successful, active living at work must become part of "who we are."

1.3 ACTIVE LIVING IN THE ORGANIZATIONAL STRUCTURE

The implementation of active living is more than a mere graft of a program fundamentally unrelated to the rest of the organization. Active living programs, to be successful, must address issues central to the organization's operations and values. Efforts must be made to ensure that active living is more than an irrelevant frill to be attached arbitrarily to ongoing operations.

It is essential to position active living within the existing organizational structure to ensure its integration into operations.

However, there is really no single proper organizational location for administering active living. Location depends on many factors, among them the kind of program you develop, work loads of key individuals, personalities involved, availability of external resources, and the nature of the overall organization.

Construct an outline of your organization's basic structure. Large organizations may have such elements as a Board of Directors, Chief Executive Officer, Personnel/Human Resources, Finance and Administration, Staff Training and Development, Employee Assistance Program, and so on. Small business will have a less complex organizational structure to work with.

Now, ask yourself:

1. Where does our active living program fit into this structure?

2. Is it situated where it will be recognized as an important program?

Yes_____ No_____

3. Will the person in charge of the program have direct access to senior management?

Yes_____ No_____

4. What other implications are there for designing our program based on this structure? For example, communication channels.

5. What major changes in organizational structure (if any) has the company been through in the last 5-10 years? Will these changes benefit or undermine our initiative?

6. How could our active living program help build a sense of team spirit in the organization? What would need to take place in order for this to happen?

7. Which of the key figures in this structure will most likely support our efforts? Who will not support them? Does this information affect the design in any way?

8. Has the organization weathered any major crisis in the last 5 years that may have a strong bearing on the project? For example, loss of chief executive officer, union-management disagreements or major financial cutbacks.

Yes _____ No _____

specify: _____

9. Is the program affiliated with a department which has a positive reputation and is known for its energy, enthusiasm, novelty, health, freshness and competence? Yes _____ No _____

10. Are there opportunities for developing ties with and having access upper management? Yes _____ No _____

1.4 EMPLOYEE INVOLVEMENT

THE CHANGING WORKPLACE

Employee surveys and needs assessments do not stop with an initial analysis. The work-force is constantly changing and requires regular assessment. Remember not to set up any expectations by asking employees about options your program does not have the scope to offer.

Focussing your attention on employees' needs and interests is especially important because of the major shift in values in our society. Today, workplace health initiatives are being adapted to keep in tune with the forces of social and economic change that are affecting the way we value the quality of our lives. There are many changes in the way people view their working lives as they search for personal growth and self-advancement.

People are looking for ways to stretch their limits and take on positive goals and attitudes. Employees will look to employers for support in their efforts to balance working and non-working pursuits. Employers will be motivated to maintain and enhance a responsible workplace that, in addition to traditional benefit packages, offers systems and processes that are responsive to the changing needs, aspirations and values of the workforce.

As you move along in your efforts to get your active living program up and running, ask yourself:

1. Does our program provide participants with activities that enable them to express themselves and experience their potential?
Yes_____ No_____
2. Have the people who will be affected by our program played a meaningful role in planning it?
Yes_____ No_____
3. How will the program affect and relate to the participants' families?

4. Will confidentiality be ensured?
Yes_____ No_____
5. Do program goals reflect the consensus of the employees?
Yes_____ No_____
6. Have issues raised by employees been addressed?
Yes_____ No_____
7. Have solutions to identified problems been incorporated into the program design?
Yes_____ No_____
8. How has the program dealt with specific health problems and hazards relevant to the

employees' worksite and personal needs?

9. How will the program positively affect teamwork, communication, trust levels, productivity, responsibility, cooperation, and collaboration?
-
-

10. Has the program addressed the personal, occupational, familial, social and environmental aspects that influence well-being?

Yes_____ No_____

11. Are we willing to accept criticism, especially from program participants, and to refine our activities as a result?

Yes_____ No_____

Employees need to understand and participate in the events that shape the quality of their lives. The process of having your active living program become an integral part of your corporate culture must seek to create or maintain a climate of collaboration, open communication, trust, respect and support. Throughout the phases of planning, designing and implementing your program, employees and employers need to be actively involved.

EMPLOYEE ADVISORY COMMITTEE

The formation of an employee advisory committee ensures and encourages active involvement. You may already have an advisory committee which was formed to develop an active living program proposal for management approval. This may or may not be the same committee which goes on to design and implement an active living program. The make-up should reflect the program's current needs.

Whatever the case, the role of the employee advisory committee which is getting the active living program up and running should be clearly defined. In some cases, it may be a decision-making body with complete control over the program budget. It may be a group which works in more of an advisory capacity. It may be a network of employees from each department or location who volunteer to promote the program at their work locations and organize special events.

Selecting committee members

Seek out respected employees.

As you get to know your employee group throughout the initial planning stages, you may come across some natural leaders. Encourage them to come forward to sit on an employee committee. Or ask interested employees to indicate their willingness in becoming involved as part of the employee needs

survey.

Ensure a *cross-section of employee groups*.

In a large company, this may include representation from management, the union, health and safety committee, personnel, and any other groups you feel would be helpful to the cause. For smaller companies, key influencers may be more obvious.

Make the group a manageable size.

A committee of three to a maximum of 10 members is advised.

Member qualities.

Choose effective role models — some leaders and some followers; those supportive of the program goals and enthusiastic and cooperative towards achieving them; those with good communication skills; and those with a demonstrated ability to get things done, be creative and give constructive opinions.

Time commitment.

Committee members should be made aware of their duties, frequency of meetings (for example, 2 hours a month); responsibilities between meetings, and the length of membership on the committee. Consider having members serve for a certain length of time, say one year, and stagger their terms so that the entire committee is not retiring at the same time.

When developing an employee advisory committee, some of the following issues, if present in the corporate culture, may have to be addressed:

- Recognition of committee activities as part of one's job responsibility
- Support by management for the committee's goals and purpose
- Recognition of the importance of broad representation from workplace sectors on the committee
- Permitting additional time for committee activities; employees often solve this dilemma by volunteering some of their own time
- Management by committee may seem slow and politically complicated in large organizations. This, and the issues presented above, can be overcome if the employee committee is well managed. This responsibility is an important function of the active living program manager, who must have the leadership to develop an employee advisory committee's ideas and channel them into workable plans.

Fostering support and ownership by committee members

Feelings of ownership of the program will contribute heavily to its success. The following suggestions are the kinds of activities a committee may be involved with to ensure members' commitment, support, and ongoing personal involvement:

- Develop the logo and mission statement for the program or organize an employee contest to do this
- Support and promote program activities at their own work areas
- Review and revise the proposed program plan
- Identify employee interests regarding active living initiatives by, for example, conducting

informal surveys

- Establish a communication network that will reach all employees
- Help with labour-intensive events such as a family sports day
- Solve problems by, for example, planning a strategy for getting management to participate in some program events
- Team up with existing committees, such as occupational health and safety, when planning new initiatives.

Tips for those leading an employee committee

- Use meetings to share ideas, gain feedback and support, and help others to learn and understand all facets of your active living initiative's operations and goals
- Recognize that all team members have personal and professional areas of expertise and interest
- Use consensus decision-making processes as a normal way of conducting committee affairs; give each member a chance to speak
- Encourage committee members to be leaders of their active living program
- Provide knowledge each time your committee meets. This may be distributing an article on a new research findings, trying out educational workshop materials, or sharing year-end reports
- Rotate the task of chairing and taking minutes amongst all group members
- Have regular active living events planned by committee members on a rotational basis, such as fund-raising activities
- Show a personal interest in each committee member by touching base regularly to share planned activities; celebrating birthdays; recognizing personal achievements; celebrating program successes; saying "Thank you", "I'm sorry", and "Congratulations"; and sharing troubles, joy and laughter with each other as a part of normal activities.

2. HUMAN RESOURCE DEVELOPMENT AND LEADERSHIP

Without good leadership, the best equipped active living initiatives will fail; with good leadership, a program lacking many desirable material features can still be a success. Quality leadership is also essential to the growth and development of a culture which values active living.

Active living in the workplace and the implications for leadership development are constantly evolving. As a consequence, the manner in which leaders are recruited, selected, trained, supported, and developed will likely change over time.

Within the broad context of active living, a variety of leadership skills and functions are needed, and may include all, or a selection of the following: volunteers/volunteer active living leaders and professional leadership, contractual services or internal staff.

Leadership needs will vary from company to company, depending on several factors, including:

- the size of your organization and the scope of your active living initiative
- the financial resources committed to the program development
- the in-house resources available such as the occupational health nurse, social clubs, and recreation consultants
- the presence of an active living facility requiring supervision.

Whether your human resource team is made up of paid or unpaid staff, the process discussed below of developing and supporting your active living team applies to all members of the team.

2.1 VOLUNTEERS/VOLUNTEER ACTIVE LIVING LEADERS

Active living programs frequently rely heavily on the dedication of many volunteers. Success depends on the enthusiasm with which volunteers carry the active living message to other employees.

Volunteers do more than just promote initiatives; they are the communication link between sites or employee groups and the active living committee. Some are involved in planning program strategies while others may plan the logistics of running specific initiatives at the sites; they book the space, borrow the equipment, get the funding. Within the scope of some programs, employees are trained as volunteer leaders for activity-based programs such as coaching teams and leading classes.

Volunteers have varying degrees of commitment. Routine or sporadic tasks are the most that some volunteers wish to take on because of time limitations, family responsibilities, and so on. Volunteers need to know exactly what is expected of them. The following volunteer model identifies the commitments of time and effort needed for different types of volunteer tasks.

VOLUNTEERS RECRUITMENT AND SELECTION

September and January are ideal times to run recruiting campaigns. Many employees are ready to tackle new challenges in the fall and in the new year. These are also good times to incorporate volunteer training and re-training programs for new and veteran volunteer teams. Retired staff may be interested. Security or janitorial employees may want to become involved. In creating a positive program image, you may attract volunteers without having to look for them.

In selecting an effective activity leader look for someone who:

- has appropriate certification
- is prepared and organized
- is enthusiastic, cheerful and good-humoured
- places a high value on personal well-being
- gives suitable advice and encourages participation
- leads by example and enjoys a healthy and active lifestyle
- is empathetic, personable and sensitive to individual differences.

VOLUNTEER ROLES AND RESPONSIBILITIES

A clear job description, complete with clear roles and responsibilities, should be laid out for your volunteers, and should include:

- job title
- specific objectives
- responsibilities with duties precisely and clearly stated, and identified lines of authority
- time requirements including specific hours per day, week, or month
- procedure for reporting absence (if applicable)
- duration of the position
- qualifications required
- training that will be necessary.

Refer to the sample terms of reference in Appendix E which indicates some of the roles and responsibilities a network of active living employee volunteers in a multi-site setting may have.

A volunteer should be fun loving, outgoing, and able to work in groups to develop theme activities and organize special events. Task results-oriented types like to make exercise tapes, work on volunteer handbooks, write articles for promotional materials, and help prepare activity schedules. Volunteers who enjoy having authority prefer to head committees and chair volunteer meetings.

GETTING THE BEST OUT OF YOUR VOLUNTEERS/HUMAN RESOURCES

If you are planning to recruit employee volunteers for your active living program, you need to make the commitment to effectively (1) train and develop, (2) support, and (3) evaluate them. Here are some ideas on how to get the most out of and give the most back to your human resources.

1. Training and development

Depending on the role volunteers play in your active living program, training and professional development are important. Providing opportunities which relate to the volunteer's job such as paying for fitness certification or CPR courses for exercise class leaders can significantly enhance their commitment and expertise while demonstrating your commitment and support to them.

Various stages of training may be provided, including:

- a. *Orientation* or *in-service* teaches the volunteer recruit about the active living program and how, when, where and why it fits into the organization. Encourage comments and suggestions and incorporate the ideas into the planning process. Get to know each volunteer and create a profile of each to share with other members of the team.
- b. *On-the-job training* is the most effective training of all.
- c. *Continuing education* ensures that volunteers feel they are growing and expanding their skills, experience and knowledge. The challenge and choice of workshops, coaching clinics and other special courses, field trips, seminars and access to videos and other resources will help keep volunteers motivated. A list of those groups offering courses can usually be found with

- your local community recreation departments and fitness associations.
- d. *Self development* is important for volunteer fulfilment and should be encouraged. Have individuals set some personal goals and help them decide on the steps they will need to reach those goals.
 - e. *Apprenticeship training for volunteer leaders* is available when a company hires experienced contract professionals to help get the program up and running until volunteer leaders are ready to take over. Starting this way gives those volunteers who will be acting as instructors an opportunity to apprentice with an experienced leader.
 - f. *Peer training* means that individuals become leaders of their peers; for example, older workers and workers with a disability.

2. Support and recognition

One of the biggest factors in keeping volunteers motivated is how they are perceived by their peers and supervisors. Make sure everyone knows how volunteers are contributing to the success of your active living program.

Whether you are managing a team of volunteer active living leaders or a small group of volunteers leading less formal active living events, you need to look for ways to recognize and show appreciation for their efforts.

On a regular basis:

- Set time aside for personal chats
- Send "Thank You" notes for special contributions
- Conduct informal updates and quarterly review sessions
- Communicate and visit regularly with volunteers in all locations. Show support by attending their events or classes
- Provide free tickets for a special event
- Design a Hall of Fame in front lobby with pictures of volunteer(s)
- Feature volunteers' contribution in the company newsletter
- Promote within the volunteer ranks with a title appropriate to the position and training; for example, active living leaders, volunteer supervisors, and volunteer programmers
- Consider keeping accurate and confidential service records for credit towards future job applications
- Encourage a positive attitude and support of management towards volunteers.

On a yearly basis:

- Provide new uniforms
- Host a special thank-you event. Invite senior management to make special presentations
- Coordinate a (weekend) training retreat
- Offer opportunities to attend community-organized events at the organization's expense
- Recognize involvement with volunteer 1, 2, and 3-year pins
- Evaluate every volunteer once a year and recognize employees' volunteer contributions in their annual review
- Evaluate the volunteer program every 6-12 months.

3. Evaluation

The Active Living Manager should provide ongoing evaluation/feedback as part of volunteer recognition. Have each volunteer write a brief statement of his or her expectations.

Evaluate whether these expectations have been met and why. Plan and record expectations for the following year.

Evaluation of the volunteer program as a whole will determine what changes are necessary.

1. Is money spent on the volunteer program justified?
2. Do staff understand why volunteers are being used?
3. Are volunteers enhancing and extending the program's efforts?

VOLUNTEER SUPPORT STAFF

If the administration of your active living program is under a departmental wing, the staff of that department might be "volunteering" some of their time. Secretaries or receptionists in these departments, or facility attendants in a facility-based program, are often the first line of communication between participants and the program staff. These staff should have excellent "people skills" and be friendly, courteous and personable.

It is important to give support staff the information they need to field questions regarding the active living program and acknowledge them for their valuable contribution.

2.2 PROFESSIONAL LEADERSHIP

If your program plan includes the employment or contractual services of active living professionals to deliver your program, choose carefully to reap the advantages of the services, experience and qualifications they provide.

Professional consultants are available to serve virtually all the program's needs; that is, they can do all or part of designing the program, hiring staff, consulting on the design of facilities, managing programs, presenting courses, supplying materials and equipment, and evaluating programs.

Base your choice on their leadership abilities, not just because, they are experts in program planning. "The leader must act as a visionary, moderator, facilitator, change-agent, negotiator, counsellor, tutor and companion." Employees must feel that they, not the professional, own the program.

Do you need professional leadership? Many organizations provide popular active living initiatives using internal staff and enthusiastic volunteers only. They may supplement their needs and resources by collaborating with a wide variety of community and national advisors. Other organizations prefer to hire outside professional staff to support their efforts.

What you choose to do will likely depend on the size and scope of your active living initiative, financial resources, involvement of employee volunteers, and collaboration from internal, staff such as an occupational health nurse, or from social clubs, and so on. A major factor that influences the hiring of professionals is whether the program includes a program facility or not.

How to select. An interesting question arises when you come around to selecting professional staff to help you with your active living initiative — who selects the professional if your company knows very

little about workplace active living? Structure your selection committee to provide balanced input to the task of selection:

1. Medical representative; for example an occupational physician and/or a nurse
2. Management representative
3. Union or employee representative
4. Recreation or social program representative
5. Outside expert in the area of workplace active living.

To allow for both the company and candidates to evaluate each other's interest in a given position, you need to advertise, critique résumés, check résumés, and interview.

WHAT TO LOOK FOR

Planning and implementing an effective active living strategy can require many hours and a variety of leadership skills and experience in business and health-related areas including business administration, promotion and marketing, interpersonal communication and counselling skills, and behaviour modification.

Experience from a variety of settings can be valuable when your program is still being defined; for example, parks and recreation, physical education, fitness and health, volunteer supervision and development, business and human resource management.

If you put together all of the information presented in this manual, you will have defined the focus of your active living initiative, and as a consequence, created a job description of many of your human resource needs. The actual requirements and functions will vary from one organization to the next depending on whether the job is part- or full- time and whether additional human resources are available. A sample job description for an active living practitioner is presented in Appendix F .

WHERE DO YOU FIND PROFESSIONAL LEADERSHIP?

Many excellent active living professionals do not advertise widely, so you may need some help seeking them out. Some provincial associations and government agencies have compiled directories to guide companies in locating services and products.

Contact the following to seek out potential human resources:

- Professional associations such as The Alberta Centre for Active Living;
- The Alliance for Health and Fitness, the Employee Lifestyle Management Alliance (ELM),
- Provincial departments responsible for physical activity and health
- YMCA/YWCAs
- Universities/colleges who offer co-operative programs through their physical education and kinesiology departments
- Hospitals
- Not-for-profit organizations and community-based agencies.

Check with other companies to determine their satisfaction with service providers.

INTERNAL STAFF

Whether it be on a part-time or full-time basis, some companies prefer to hire internal staff to coordinate and operate their initiative. Companies who choose this option feel that employing a professional ensures better integration into the corporate culture. They are also willing to commit the management time needed to oversee the program. A smaller business may want to hire a professional to serve as the program director in charge of program design and delivery, and use its existing administrative and support staff to supplement his or her efforts.

Certified fitness professionals, sometimes referred to as fitness counsellors, exercise leaders, or exercise specialists, usually serve as the on-site staff in a facility. They also may provide services to conduct exercise classes, fitness assessments, seminars on physical activity, or coach corporate sports teams. In small programs, these individuals could be hired as part-time employees to manage the facility during peak hours.

At the very least, a small program can free the program "champion" or another staff member to perform the program manager's responsibilities, with the employee committee serving in a support capacity.

Whatever the situation, it is important to choose someone who can address your program needs and who will fit in well as an employee.

3. PROGRAM PLANNING

The next step is to begin planning an active living program that meets the needs and interests of employees and management. To do this, a more in-depth consideration of some or all of the following may be needed:

- 3.1 internal and external resources
- 3.2 program policies and procedures development
- 3.3 financial planning
- 3.4 program evaluation.

3.1. INTERNAL AND EXTERNAL RESOURCES

It is time to begin looking around you to see what resources you already have within your workplace. You will also want to check to see what may be available or suitable from nearby facilities and outdoor locations in supporting your program planning efforts.

A. INTERNAL RESOURCES

The resources you may need to develop and implement your active living program include money, space, equipment, technical knowledge, management support, communication channels, and either paid or volunteer staff to run the program. Let's discover which of these are available to you.

A.1 Existing departments/groups

The expertise and availability of other staff should be considered when appraising your internal resources. You'll want to see if your company has the following:

Medical Services may involve the nurse and physician assisting or even spearheading the initiative. This department may already conduct periodic physical examinations which will motivate employees to become more physically active and participate in the preventative or rehabilitative nature of active living.

Occupational Health and Safety is typically designed to improve safety and environmental aspects of the physical workplace. Partnerships with this group may lead to improving the work environment in terms of supporting active living and providing preventative measures and maintenance opportunities for back care and repetitive strain injuries.

Management Committees and Boards of Directors are important groups which can shape, structure, and lead the active living process.

Social clubs may organize annual recreational leagues and tournaments.

Human Resources or Training and Development departments may be relevant to the development of your active living program. Since these functions are involved in training in the workplace, they provide a natural resource and experience base for health education.

An Employee Assistance Program may have ongoing programs in substance abuse awareness. Active living can be considered a valuable outlet for those employees seeking help.

A.2 Facilities and equipment

The nature of an activity program depends heavily on the availability of space. You will want to tour the buildings and grounds to assess the possibilities and limitations. Do you have:

- Indoor and outdoor settings where walking trails can be planned when exercise rooms may not be feasible?
- Available meeting rooms where interest groups can meet? Are they accessible and convenient?
- A cafeteria layout and overall environment that is suitable for an education or participation program?
- Educational equipment, such as overhead projectors, flip charts and video/DVD machines if needed? Is this equipment available internally, or must it be rented?
- A social or recreational club that has held sports events; does it have exercise equipment available?
- Employees with equipment they are willing to donate? You may also be able to purchase used equipment from fitness facilities which are making renovations.

A.3 Finances

An assessment of the organizational resources available to the program must be carried out and considered in view of the potential benefits. Investigate answers to the following questions:

1. How much money or other organizational resources will be available for development and implementation of your program?
2. Reassigning employees represents a commitment as important as money. Will there be provisions for assignment or even hiring of staff to run the program, or will program coordination be an additional responsibility of a busy employee? It is important that someone within the company is ultimately responsible for the program, and that this responsibility be recognized in their job description. Your needs will vary depending on your particular workplace.

A.4 Communication channels

An important aspect of planning for the program is the development of a public relations campaign. To develop this campaign you must know what your communication resources are. Do you have:

- Public address announcements?
- Newsletters or magazines?
- In-house mail?
- Video and audio facilities?
- Electronic mail?
- Union publications?
- Bulletin boards?
- Other: _____

B. EXTERNAL RESOURCES

Resources for your active living initiative can also come from outside your company. They may be in the form of physical resources, suppliers of information, and/or providers of services relevant to your active living program development.

B.1 Physical resources

Look around the grounds of your company's location for the following:

- Is there room for a walking trail?
- Are there public parks, woodlands, a waterfront area nearby?
- Can arrangements be made to share the outdoor track or basketball courts of a nearby school yard?
- Could an empty parking lot be flooded and used for outdoor skating or broomball in the winter months?
- Are there waterways close by to provide opportunities for rowing or canoeing activities?
- Can arrangements be made with a local club or community centre to use or rent their facilities?

B.2 Information/education resources

A list of the organizations can be found on the internet that supply educational materials such as books, videos, manuals, packaged programs, and products. Many book publishers, media distributors, and medical supply companies annually publish catalogues which provide comprehensive listings of resource materials, coaching ideas, and educational training aids.

B.3 Service resources

Look to your community to find organizations/individuals that may be helpful in providing relevant services to your active living initiatives. Make inquiries to:

- Physical education or kinesiology departments from local universities which may offer work placement co-op programs
- Public schools with outdoor education teachers or student volunteer crews who can help with an environmental clean-up event
- Health centres which may provide a speaker's bureau for educational activities
- YM/YWCA with their certified exercise leaders
- Outward Bound which may provide weekend programs for employee groups
- Environmental groups which can provide information on recycling materials in the workplace and motivating employees to use "green transportation"
- Municipal parks and recreation centres where coaches or referees may be found
- Other companies which may be able to recommend a private consultant who has helped them in the development of their active living initiatives.

3.2. POLICY DEVELOPMENT

Most people cringe when they think about policy development, usually because the process seems to be time-consuming and is often delegated to "someone" who hides away in a small office and creates policies on their own. The end product is often filed and forgotten. On the other hand, policies may

exist but be unwritten. An examination of how things have been done in the past may indicate an unwritten policy direction.

Review of existing policies

Neither the unwritten policies nor the filed ones will be effective in ensuring that active living programs become permanent elements of the corporate culture.

It is a good idea to investigate existing policies and regulations which may enhance or interfere with active living practices.

Make a list of existing policies which are relevant to active living, including how they came about and where they can be found. For each policy, ask the question: Is this policy active living "friendly"?

Example:

Policy: Policy 123. Flextime.

History: Initiated by the union executive and processed by a joint union-management committee.

Benefit: Flextime has proven to be helpful in providing employees with more time at lunch to participate in physical activities.

Location: Personnel Policy and Administration Manual, Section "F", Benefits.

Successful policies

It is very important to establish written policies that support and encourage employees' participation in physical activity. These policies provide planning tools and guidelines for active living programs and initiatives, outlining the allocation of physical, personnel and financial resources, and how the organization plans to set program goals and deliver the program.

The secret to successful policies lies in their relevance to day-to-day activities, how readily they can be put into operation and evaluated, their scope in encouraging involvement, and their flexibility.

Whether you are creating new policies or making changes to existing organizational policies to enhance active living behaviours, the policy development committee will discover its own way to access the correct procedural steps that will ensure support from management and employees.

You will need to link into all organizational activities that influence active living participation. Some of the ways to get support for the changes you want to influence may include:

- Becoming a part of management training seminars to spread the active living message and gain support
- Meeting regularly with representatives in the cafeteria, safety training departments, personnel,

medical services, and so on, to discuss means of providing opportunities for employees to participate in active living

· Getting on the agenda of departmental meetings.

3.3 FINANCIAL PLANNING

The most difficult time to develop a financial plan is during the first year of operation. If terms like "operating budgets" or "capital amortization" confuse you, seek help from your financial department. A good source of information for cost projections of a new program is the experience of other companies with similar initiatives.

When a budget is properly administered, it is both a planning and a control tool. As a plan, it provides a specific statement of anticipated financial outlays and covers a specific time period. As a control, it frequently determines the scope of the program design, and forms the basis for future financial plans.

Regardless of the scope of your active living initiative and the company's level of support funding for program operations, costs should be tracked and measured against outcomes. Planning and controlling a budget are important for proving the cost-effectiveness of your program, demonstrating the importance of various program components, showing high-quality results, and using the budgeting process as an opportunity to analyze and improve the operation of your active living program. You and the future of your program will only benefit from the added knowledge that results from detailed budget records.

PLANNING MONITORING AND CONTROLLING THE BUDGET

Developing an effective financial plan follows several steps:

Step One: Projecting costs and revenue

Step Two: Approval of final budget by management

Step Three: Monitoring the budget

Step Four: Budget control.

Step One: Projecting costs and revenue

This step consists of collecting all the information necessary to project a budget, including both costs and revenue. The items you will want to research costs for include: (a) your capital budget items and (b) your operating costs.

A. Capital costs

The capital budget includes all items of a permanent or semi-permanent nature such as land, buildings and equipment. When purchasing major equipment items, it is important to calculate depreciation costs by amortizing the acquisition cost over the life of the equipment. The depreciation cost might become a line item in the operating budget. In the case of facility construction, the design and construction costs can be also amortized over a longer period of time.

The following is a list of initial capital needs for the ABC active living facility:

| | |
|--------------------------------------|----------|
| Feasibility study costs | \$ _____ |
| Architect/facility designer | \$ _____ |
| Construction costs | \$ _____ |
| Construction contingency | \$ _____ |
| Equipment/furnishing costs | \$ _____ |
| Legal fees | \$ _____ |
| Facility and program manager | \$ _____ |
| Licenses and permits | \$ _____ |
| Landscaping | \$ _____ |
| Miscellaneous; eg. printing costs | \$ _____ |

For the many active living programs which don't involve a facility, the capital needs may include:

| | |
|---------------------------------|----------|
| Computer equipment | \$ _____ |
| Audiovisual equipment | \$ _____ |
| Bike racks | \$ _____ |
| Sports/exercise equipment | \$ _____ |
| Fitness testing equipment | \$ _____ |
| Self-help resources for library | \$ _____ |

In most cases, it will not be necessary to involve construction costs unless there are plans to landscape a walking trail or renovate an existing space for shower facilities.

B. Operating budget

Once the initial capital costs have been established, you need to determine the financial needs for the first 12 months of operating the program. This process will determine the annual operating budget that must be generated.

The most effective way of determining operating costs is by a preliminary budget. A preliminary budget provides a plan for estimating future revenues and expenses. Operating costs consist of expenses associated with the day-to-day operation of the program or facility.

For most programs of modest proportions, the largest operating expense will be wages and training for full- and part-time staff, as well as time spent on the training and development of volunteers. Salary adjustments for promotions and any costs associated with temporary coverages for vacations and sick leave should be anticipated. Check out benefit rates from your personnel department and factor them in as well.

Although rent, utilities, and occupancy costs may be absorbed in another area of the corporate budget, you may be asked to track these costs as well.

C. Generating revenue

Typically, all of the financial support for active living programs does not come directly from the

company's general operating fund. A list of projected revenues should be established and may include:

- A direct contribution from the employer
- Direct cash support from participants (modest membership dues or fees for special events)
- Contribution from concessions, fund raising, grants
- Subsidy plans in which part or all of the cost for employees to join an outside facility are covered by the company. More creative subsidy plans refund a portion of the fee after goal achievement or regular participation has been demonstrated. Refer to page 37 for help in planning subsidy strategies.

Generating additional financial resources to offset program expenses can, by virtue of the event itself, encourage involvement in active living and be effective in promoting your program. Potential sources of revenue include:

- Raffle events. Prizes can include bicycles for the adult and child, sportswear, fishing equipment, tickets to sports events
- Retail sales of bulk items such as books, "starter" garden seedlings and tennis balls
- "Garage sale" of donated sports equipment by employees or from the community
- Recycling events such as paper and bottle drives
- Fund-raising events such as walkathons, dances, and bicycle repair services
- The packaging of programs to sell to other organizations such as exercise leadership training courses, volunteer development clinics, or coaching clinics

The ultimate source of financial support for your active living initiatives will come from the savings accrued from reduced health care costs, reduced absenteeism and other program benefits. However, recognizing and securing these savings requires significant time, effort and cooperation from supporting areas such as personnel records, medical department, and insurance companies, and is not considered part of your income statement.

Step Two: Budget approval by management

All of the available information you have collected is combined into a projected budget and submitted to management for approval. At this time of negotiation, you should be well prepared to act as a source of information to management and to present the costs and benefits of the program in an accurate and positive light. For example, management may be reluctant to spend large amounts on staff salaries or volunteer leadership development, which often appear as a large expenditure, because they generally are unfamiliar with the specific requirements of an active living program and, in particular, the critical importance of good program leadership.

After the projected costs are reviewed by management, certain items may be negotiated, and it may be necessary to revise the program design to match the level of funding that has been approved. After all of the negotiations are completed and the budget is approved, the planning stage of your budget is concluded.

Step Three: Monitoring your budget

The next stage involves monitoring the budget throughout the year. Actual expenditures are compared with your initial projections. A monthly operation budget work sheet is offered in Appendix D.

Monthly or quarterly monitoring is usually adequate. Deviations from projections may signal potential problems; and can also reveal positive aspects of the budget, such as savings being made in certain areas, or increased participation.

A single-ledger record-keeping system is the least complicated budget format. Each item of expenditure is listed on one line of the budget and items are grouped into categories, such as salaries, physical plant, and supplies. More complex balance sheets can be put together with help from company employees responsible for finances.

Step Four: Budget control

Controlling the budget consists of taking appropriate action when actual costs deviate from projected costs. Management must judge whether increased spending levels are acceptable, then increase the budget; request that actual spending levels be decreased to projected levels; or change allocation of funds among the various program activities. Budget flexibility is important here.

Once you have developed your program goals and objectives and established a budget, you have a means to evaluate whether your program is meeting its objectives. For example, if your goal is to reduce absenteeism by fifteen percent in the shipping department, you measure and compare the absenteeism rates before and after you begin your program initiative. If increased participation rates or improved cardiovascular fitness is a goal, pre- and post- measurements are effective.

3.4 EVALUATION AND RECORD KEEPING

Each organization must determine its own values in evaluation. Your evaluation plan will depend on many variables including available resources, corporate objectives for the active living program, and the scope of the program design. A good evaluation process is useful in providing the best information about how your program is functioning and whether it reflects corporate goals.

A brief discussion of program evaluation follows, because it is a fundamental consideration in program planning. Further discussion of evaluation methods is found in Chapter Six.

COMMON GOALS FOR EVALUATION OF WORKPLACE ACTIVE LIVING PROGRAMS

- To determine how successful and effective an activity has been in achieving its goals
- To determine the cost of a program activity and to justify past or projected costs or expansion of a program
- To determine future plans of action
- To measure progress toward organizational goals
- To identify the programs which best meet the employees' interests
- To learn more about active living programs in the workplace and their effects on absenteeism,

productivity, turnover, long- term and short-term disability, compensation claims and extended health benefits

- To ensure continued visibility with management and/or enhance a positive image of the company
- To determine whether active living has been integrated into the corporate culture.

EVALUATION DESIGN

The evaluation design is your plan for systematically gathering, analyzing and reporting information you will need to assess the effectiveness and success of your program.

Check to see that it describes:

- The purpose of your evaluation with specific objectives
- When you will collect data (that is, pre-test, post-test)
- From whom you will collect the data (that is, program participants, non-participants)
- What techniques will be used to collect the data (that is, questionnaires, interviews, participation rates, absenteeism and other record reviews)
- How the data will be collected (that is, in person by paper and pen, by mail survey, structured interview, informal survey)
- Who will be responsible for collecting the data (an in-house evaluator, the head instructor, the program manager, an outside consultant)
- How the data will be analyzed and presented (for example, group profile, computer analysis, and so on)
- Specific evaluation objectives.

Few active living programs are evaluated solely on a financial basis. In most settings, more intangible factors are included: individual perceptions of well-being, job satisfaction, improved morale amongst employees, and observable changes in individual behaviour, knowledge, skills and attitude.

Evaluations are undertaken for a variety of reasons. For example, an executive may be under pressure to produce impartial evidence that programs are performing effectively and provide significant benefits such as in reducing absenteeism. A program manager may focus on employees' participation, the programs' effects on corporate culture, and the degree to which they, and their families, benefit from active living. Participants may care only about personal success in improving their fitness, controlling their weight, or managing their stress.

Find out:

1. What does evaluation mean to your management?
2. What does evaluation mean to the program manager?
3. What does evaluation mean to your participants?

Participation in program activities cannot be assumed to result in behaviour change, nor can behaviour changes be assumed to guarantee changes in costs or benefits. Clearly then, several different types of evaluation would need to be developed to address each kind of question. Refer to

Chapter Six for more information on various types of evaluation.

KEEPING RECORDS

Measuring the impact of your program is one assessment you may want to track. A simple method of recording employees' participation and periodically charting the data yields graphs and charts that can effectively evaluate how your program is doing.

4. PROGRAM MIX OPTIONS

Implementing an active living initiative takes detailed planning and a willingness to look beyond the conventional. Traditional ideas for physical activity can shut out some employees. Instead, frisbee, golf, planting a garden or going ice fishing may spark other wise reluctant interest. As an overall objective, strategies to implement active living programs should strive to encourage healthy, active lifestyles for all employees.

One additional element is necessary for an active living initiative to be successful. A program is only as effective as the participants' belief in their ability to be in control of making lifestyle changes.

4.1 AWARENESS

Awareness strategies are based on the principle that behaviour cannot change unless people are aware of alternative lifestyle choices. Awareness strategies try to catch the interest of potential participants without intimidating or singling anyone out. These programs use the "reach and repeat" concept. Like an effective ad, they are intended to heighten awareness and generate further interest by providing a battery of messages around a given theme. The following are some avenues for increasing awareness in active living.

ADVERTISING

Active living initiatives can be extensively promoted through posters, flyers, table displays in lunchrooms, videos and newsletters, to name a few. Using creative advertising, a company promoted their annual family fun- run through a paycheck stuffer that resembled a one hundred dollar bill. The event attracted many family members and their friends.

Specific programs can be further promoted by electronic mail, voice mailbox and PA systems. You can install an answering machine to reach those employees who work irregular shifts in both central and remote locations. Use entertaining active living messages and provide information on activities.

CHECKLIST FOR DESIGNING EFFECTIVE MATERIALS

When creating your advertising materials, write from the audience's perspective and emphasize the positive benefits of active living. You want your audience to receive the information, understand it, believe it, agree with it, and do something about it. When designing materials, check to see:

- Is the message as clear as possible?
- Are you using action words? For example, "Take the stairs to Health"
- Does the message encourage fun and social contact?
- Is the message consistent? For example, "Active Living Key to Longer Life, Better Health"
- Does the message stress the benefits of active living? For example, "learn new skills for safe boating this summer"
- Do your materials grab the attention of the reader?

SLOGANS AND LOGOS

Slogans and logos give your active living campaign its identity. They can be screened onto various items of exercise clothing or equipment that can be earned or purchased by participants. They work

best when they are used consistently over a long period of time.

Slogans and logos help build awareness of your activities or remind your target audience to take action “Active Living Key to Long Life, Better Health.”

BULLETIN BOARDS AND POSTER DISPLAYS

Are they . . .

- posted in areas of high traffic; for example near water fountains or cash registers; in elevators or stairwells; by bathroom doors or cafeteria walls?
- Changed regularly; giving details about program and community activities, up-to-date articles of interest, and so on?
- Accompanied by take-home pamphlets which mimic the display theme?

ORIENTATION ACTIVITIES

People rarely buy into a program they have never tried. Orientation events that introduce your active living program can be successful in overcoming initial reluctance when they:

- Include both information and demonstration components; for example, a mobile active living display could be moved to multi-location worksites and provide heart beat checks, demonstrate sports equipment, and provide information about active living programs available at the worksite
- Include a healthy snack and offer draw prizes
- Are made easy for employees to attend; for example, during early morning or shift changes, especially outside workers' sites
- Are tied into ongoing meetings, staff meetings, union meetings, or stretch breaks
- Act as “news breaks” to keep employees up-to-date on what is happening in the program, as well as making time to ask for their suggestions.

NEWSLETTERS

The definition of a good newsletter is: “A slow trip to the wastebasket.” Whether it comes black and white or blue and grey, a well-written and informative newsletter serves as a multipurpose tool. A newsletter can help enhance camaraderie among your active living participants, inform and educate readers with up-to-date information, promote your activities or special events, and establish your program's image and credibility.

Here are several points to consider if you intend to launch a newsletter for your active living initiative:

- Be clear in your aim. Is it to educate, entertain, and/or advertise?
- Find the right look with an easy-to read layout. Get ideas by sharing newsletters with other active living programs
- Determine how often you want to publish, and stick to the schedule
- Decide how you will handle distribution for example, through company mail or send it electronically
- Direct the content to the interests and concerns of the employees
- Speak in plain and simple language, using a personal conversational style
- Make your employees an important part of your newsletter. Recognize their achievements and encourage submissions
- Put together a file or “fillers” — short articles — for future use. Refer to page 50 for resources

to assist with content and design.

THEME AND SEASONAL CAMPAIGNS

Special events such as an annual fund-raising activity or an annual family picnic contribute fun, variety, public relations opportunities, and motivational experiences.

Many national organizations have theme months that can be tapped for resource materials for active living. Some monthly theme planning ideas are found in Appendix G.

Tune in to **seasonal cycles**. In January, people think about New Year's resolutions and want to know how to get started. Pre-swimsuit season is another time when people are eager to get active. Be aware that program participation tends to drop off during summer holidays. September starts the school cycle and is a time when employees with families have more structured lives.

Work-load cycles with each company will affect program participation; for example, when companies are preparing year-end statements. Your activities need to support employees during these demanding work cycles, not compete for their time and attention. Why not offer shoulder and neck massage sessions or stretch breaks as a welcome reprieve?

4.2 EDUCATION

Education strategies seek to provide people with the information they need to enjoy active living choices. People want to know the benefits of an active lifestyle and its relationship with other health issues. Good education requires participation in discussion, with the leader actively involving the participants in the learning process.

MINI-LECTURES

Within any organization or community there are many people who are experts in their favourite physical activity. Invite the local golf pro to give pre-season conditioning tips, ask an orienteering club member to tell employees about this exciting family sport, or have a walking enthusiast talk to fellow employees about appropriate shoes and some of the local walking routes.

RESOURCE CENTRE

Books on how to build your own canoe, how to pack your backpack, travel videos and sports skills books are readily available or can be contributed by employees. Walking magazines, environmental brochures, audio tapes, and instructional videos could be maintained in a small resource library with employees being able to sign items out to read or view at home. For employees who work off-site, the company's stretch break program can be put on video for them. Organize a travelling library for visiting other work sites and leave pamphlets and information for those employees who are reluctant to join in.

SCREENING AND ASSESSMENT

The primary function of a physical fitness assessment tool is to help people become aware of those elements of their lifestyle which may create risks to their health. Wherever possible, you should organize your assessment programs on a test and re-test basis to encourage personal goal setting and to provide feedback on changes that occur over time.

a) Fitness testing and counselling

The popular Canadian Standardized Test of Fitness (CSTF) is a set of procedures used to evaluate specific fitness components. These include standardized measures of body composition, aerobic fitness, muscular strength, flexibility and muscular endurance. The CSTF requires about 45-60 minutes per participant to complete and must be administered by a Registered Fitness Appraiser. A sample fitness testing information sheet is included in Appendix H.

The most important aspect of the CSTF appraisal process is the promotion of an active lifestyle during the interpretation and counselling session which follows the test. The employee should receive feedback on the results of the tests through a small group review or individual counselling sessions. This can be an opportunity to build a relationship between your active living staff and employees, as well as allow group support to begin.

SOFTWARE PROGRAMS AS ASSESSMENT RESOURCES

The more comprehensive active living programs now include software packages as part of their education resource base. Most of these are designed for the purposes of screening and assessment.

4.3 SKILL DEVELOPMENT

Giving people the skills they need for physical activity affords a sense of confidence, prevents injuries and encourages active living. Many adults, for example, never had the opportunity to participate in sports when they were younger, or may lack the confidence to try new activities. Programmers and instructors need to recognize and accept the various ability levels of each participant. The objective is simply to make it possible for the person to enjoy the activity safely.

DEMONSTRATIONS AND WORKSHOPS

Chances for hands-on learning of specific topics of interest are a great way to encourage people to choose healthy activities. Be sure to select the right facilitator for the topic. Search for one who will properly educate and motivate participants. This aspect of your educational strategy can range from short noon-hour sessions to evening and weekend workshops.

DEMONSTRATION IDEAS

Instruction in speed walking may evoke enough interest to start an active walking club among employees. This is an excellent non-facility program.

Many worksites have recreational teams: coaching seminars and injury prevention workshops could help improve skills and avoid injuries.

Specialty classes in ballroom dancing, pre-natal and postnatal fitness, yoga, pilates, tai chi and self-defence may appeal to employees.

Demonstrations and instruction in ethnic dancing encourage multi-cultural groups to get involved.

Participants can learn about safe cycling and how to look after their bicycles in repair clinics. They can be opened up to family and friends if held during evenings and weekends.

Instruction about the skills needed, accompanied by information on the rules for such sports as cross

country skiing, cycling, skating, badminton, volleyball, water polo, lawn bowling and others, will make an adult feel more comfortable about taking part in the activity.

Workshops

Workshops are more difficult and time-consuming to organize than demonstrations, but the benefits may be greater since they can include group interaction and discussion and actual trials of the activity. Adult education principles are basic to the design of effective learning situations where lifestyle change is an objective.

Tips for Workshop Delivery

1. Be brief
2. Be selective in information presented
3. Organize your information conceptually
4. Present clear outlines
5. Categorize information
6. Present information in order of importance.
7. Make use of repetitive and multimedia approaches
8. Consider participants' education level
9. Involve participants in their own learning; for example, have people make their own fish flies or practise a golf swing.

EDUCATIONAL RESOURCE SUPPLIERS

A growing number of educational tools such as pamphlets, videos, posters, booklets, flyers, and other resources for active living strategies are available from many sources. Canadian organizations and suppliers include:

- Federal and provincial bodies such Physical Activity Unit of the Public Health Agency of Canada (PHAC) or the Coalition for Active Living
- National associations/societies such as the Arthritis Society, the Red Cross Society, the Cancer Society, the Heart and Stroke Foundation, and the Lung Association
- Publishing companies such as Human Kinetic Publishers
- The National Film Board and the Worker's Compensation Board
- Sport governing bodies such as the Canadian Association for Health, Physical Education, Recreation and Dance (CAHPERD), the Canadian Society for Exercise Physiology (CSEP), the Canadian Fitness and Lifestyle Research (CFLRI), Go For Green.
- Provincial/territorial departments responsible for physical activity and health
- Fitness and recreation centres
- Health units
- Municipal Parks and Recreation departments
- Professional associations such as the Alberta Centre for Active Living, Canadian Public Health Association, National Quality Institute
- Providers of workplace active living pro- grams may distribute a line of educational materials.

4.4 GROUP AND SOCIAL ACTIVITIES

Active living is highly individual, with people enjoying a physical activity that fits their interests, needs and abilities. This does not mean, however, that people do not want to do those activities together.

Indeed, social and group activities provide motivation and reinforcement towards lasting active lifestyles.

STRETCH BREAKS

Exercise breaks of 5-10 minutes have been common practice in Japanese and European, factories for many years, apparently with a beneficial influence in reducing fatigue and stress and improving work efficiency. In Canadian workplaces they are less common, but as successful. These breaks can be structured or casual as needed, with volunteer employees being trained to properly lead the routine. Workplaces also videotape the routine for workers to use on their own.

WALKING PROGRAMS

Walking, as an organized activity, involves everybody. Special facilities and fancy equipment are not needed. The most successful workplace programs provide maps and the opportunity for recording distance or time. A point system can be included to reward employees for taking part in nature walks, walking to work, treasure hunts, beach-combing, window shopping mall adventures, weekend hikes, or "imagination walking". Why not a walking scavenger rally for employees and their families, where walking becomes an adventure as participants seek answers to a list of clues?

CONTESTS AND CHALLENGE EVENTS

Contests or challenges are a great way for getting people interested in active living. Team spirit and good natured rivalry can be promoted by:

- Rewarding worksites or departments for the percentage of employees who use "green transportation" to get to work
- Staging a wheelchair basketball challenge, involving both able-bodied and workers with a disability
- Organizing interdepartmental sports days
- Staging fund-raising events such as sponsoring others to jog miles, swim laps, or shoot basketball hoops
- Organizing an annual active living challenge – refer to Appendix I.

Visual status reports on challenges and contests keep motivation high. Certificates of achievement, plaques for the winning team, or draws with small prizes reward participation.

SPECIAL EVENTS

Special events at a local, provincial or national level offer opportunities for group activities. Employees can be encouraged to enter corporate teams into the Terry Fox Run, the 24-hour Relay, the Corporate Challenge or Sneaker Day.

National projects: SummerActive is an annual national, community-based communications campaign, organized by the Public Health Agency of Canada, Health Canada and Canadian Heritage (Sport Canada), and designed to increase awareness about the importance of physical activity, healthy eating, sport participation and tobacco-free lifestyles to health.

Corporate Challenge: Each year the Corporate Challenge promotes and coordinates a series of Corporate Challenge events in communities throughout Canada. In each event, teams of employees from local companies and organizations participate in a day of friendly, competitive, fun events which encourage people to take an active part in lifestyle activities.

Team and league sports

The current emphasis of company sports and recreation activities is upon team sports, tournaments

and special sports events. Tournaments are especially popular in unionized companies.

Team sports require little more than a few pieces of inexpensive equipment to be implemented at many worksites. Nearby parks or sports fields can be used for such things as frisbee throwing, velcro ball, soccer, or baseball. Any worksite with enough grass can be set up for volleyball, badminton, croquet, or horseshoes. Basketball scrimmages and pick-up games could flourish during breaks and lunch hour if hoops were put in warehouses, parking lots or loading bays.

Employees at a maintenance garage move out the equipment every day at noon and set up badminton nets and table tennis equipment. Casual games turn into ladder play and annual tournaments. Prizes of birdies and racquets, socks and t-shirts are donated from local sports stores. Trophies with name plaques attached are awarded to each division winner.

4.5 SUPPORTIVE ENVIRONMENTS

Once employees experience the enjoyment and benefits of active living, it is important that a supportive environment exists to help them continue their active participation. This doesn't mean that you need to build a special facility to house your programs. Rather, programs such as exercise classes or team activities appear to be more important to compliance than facilities.

OFF-SITE FACILITIES AND OPPORTUNITIES

With some program creativity and high-profile promotion, active living programs that use off-site locations can be as effective as those offered at the worksite. Small-and medium-sized organizations, particularly, should find this option more feasible in terms of space, expense and issues liability than either building or renovating a facility themselves.

An example of management commitment

A few years ago, a company rented the nearby Boys and Girls Club, a conveniently-located facility five minutes from their central worksite, for lunch hour activities — indoor soccer, volleyball, handball. Now exercise classes are in vogue, while die-hard soccer players use an outside field year-round. To accommodate the numbers of participants, the company has since paid for a larger hot water heater at the Club (benefiting the entire community), and allows flexible lunch hours for participants.

If your plan is to use an off-site facility for your program, be sure to check the following aspects.

Is it . . .

- Conveniently located?
- Well-maintained?
- Run by qualified, friendly staff who will treat your employees as important clients?
- Owned by a financially-sound organization?
- Able to ensure confidentiality by the facility staff?
- Equipped with flexible rates or corporate discounts?
- Large enough to handle your program activities?

Outdoor opportunities

Locations which house active living are not confined to weight rooms and aerobic dance floors. An alternative to seeking off-site facilities is to take advantage of all the outdoor opportunities provided by:

- Public parklands
- Outdoor skating rinks
- School gyms and church halls
- Community pools and arenas

- Mini-golf courses
- Ski hills
- Waterfront and greenbelt areas.

Living actively is only limited by your own imagination. Consider the following:

- Raise money for a Rails to Trails project to convert an unused railway bed into a walking and cycling trail that offers both employees and the community a chance to enjoy active time outdoors
- Match a group of workers with a naturalist club for monthly nature walks
- Join community and youth groups to plant trees and encourage students to value the preservation of natural areas
- Arrange to use a nearby playing field for soccer or the arena for broomball.

ON-SITE FACILITIES

Perseverance and ingenuity will usually uncover an area where an active living program can begin in-house. Many programs have been held in board rooms, lounges, cafeterias, renovated trailers, parking lots and park land. Making do with what you have and improvising are good approaches which can be applied to providing supportive physical environments.

Employees have said over and over again that all they really need is a shower and a place to change. Having those would encourage them to go for a walk, to ski or to dig in the company garden at lunch. What about a bicycle rack for starters?

Many programs have gone much farther by providing facilities which offer such attractive benefits as:

- Accessibility
- A variety of modern, well-maintained equipment
- Convenient surroundings
- Shower facilities
- Individualized attention by professionally, qualified, staff
- Family involvement
- Convenient systems for progress charting
- Low membership costs.

If your company is planning to construct an active living centre, a number of things must be kept in mind such as exercise space and service area requirements, mechanical requirements, equipment cost and selection, liability issues (refer to Appendix 0, and safety features.

Such an extensive project requires more information than can be discussed in the context of this manual. We suggest you get in touch with organizations or consultants who have already built on-site facilities and glean from their experience.

SUBSIDY PLANS

Typically, subsidy plans focus on paying part or all of the cost for employees to join an outside facility by the company. Successful subsidy programs come from careful planning, thoughtful policies, and efficient administration. Here are a few suggestions:

- Define the length of time the subsidy plan will be available
- Establish clear guidelines for acceptable events, facilities and level of participation
- Build in flexibility to accommodate local situations if the company has offices or plants in a number of different areas
- Consider a variable subsidy rate according to the disposable income of employees

- Recognize the accomplishments of those who participate regularly
- Structure the program so that it is easy for employees to apply for reimbursement and requires a minimum of paper work to administer.

INCENTIVES

People enjoy winning a t-shirt or getting a mention in the company newsletter. Many successful employee health initiatives have used incentives such as these to help initiate participation in their active living programs.

Incentives can be earned as rewards for participation or by reaching milestones in a program. Participation can be measured according to the number of activities, points amassed for attendance or goal achievement, distances covered, and so on.

One of the first incentive programs, focussed mainly on physical fitness. Times have changed and so has the focus of the incentive program. Today, programs take a broader focus, rewarding employees for a host of positive active living behaviours, such as taking time for yourself, volunteering in the community, achieving perfect attendance at work, and environmental initiatives like using a recyclable grocery bag and riding the bus to work.

Incentive programs - tips on technique

- Organize a kick-off event
- Design attractive activity recording cards
- Offer information sessions on setting personal active living goals
- Involve family participation
- Keep your recording cards/awards system as simple as possible
- Examine the specific needs, interests and environments in different operation locations and fine tune program when necessary
- Provide follow-up support and motivation by, for example, phone calls
- Chart progress, evaluate results and revise your program
- Offer useful incentive rewards such as magazine subscriptions, first-aid kits and relaxation tapes. Employees can band together to earn points which they can then "cash in" to buy equipment.

Extrinsic rewards such as these are good motivators in the early stages of an active living program. However, the best reward of active living is intrinsic — an improved sense of self-worth and fulfilment. Your incentive program should wean participants from extrinsic rewards and focus on setting personal lifestyle goals and striving for them.

SOCIAL SUPPORT

Social support from peers or family is an important influence in participant adherence to programs motivating behaviour change. Strategies to enhance the existing support systems at the worksite and at home should be included into the program mix. Some of these include:

- Teaching employees how to be effective in supporting each other, as well as learning how to seek or ask for support themselves
- Establishing buddy systems to encourage accountability and foster exercise camaraderie
- Providing an opportunity to feel a sense of belonging and a chance to contribute to another person's success — this approach goes a long way in keeping people coming back for more
- Sending print materials home to help keep family members aware of what is happening
- "We Miss you" cards can encourage someone who has "slipped up".

5. MARKETING AND PROMOTION

You may have already given much thought towards creating and designing your active living programs. However, you're not done yet. Unless your program is sought by employees and supported by management, your efforts will be unsuccessful. As you design activities, you also need to plan how you will promote and market them to your target groups.

The term used for the marketing of ideas, such as the concept of active living, is "social marketing". Let's take a look at how social marketing concepts apply to the marketing and promotion of active living.

5.1 SOCIAL MARKETING TIES TO ACTIVE LIVING

Social marketing recognizes that many variables influence behaviour change. In active living, these variables may include an individual's unique aspirations, abilities and preferences.

Social marketing recognizes that individual behaviour cannot be considered in isolation from its broader social and environmental context. Active living also recognizes that people live in complex societies where social institutions, cultural traditions and the environment play a central role in how physical activities are experienced.

Social marketing seeks to change cultural norms and influence people's attitudes or behaviour. Active living aspires to be valued as a fundamental and integral part of working life, replacing negative norms with positive ones.

General marketing theory checklist

As you develop your marketing plan, keep in mind anyone or some combination of the commercial market's five Ps:

Product: What are you promoting to employees? What belief or habit do you want your target audience to buy into?

Promotion: How are you going to communicate to employees? What benefits are you going to tell them about?

Place: Where and how are you going to reach employees? An on-site facility? Medical department screening programs? Do you have adequate and suitable distribution methods, as well as access to information?

Price: What are you asking employees (or the organization) to give up in order to get the program benefits? We're not talking only about money. What will it cost in terms of their habits, beliefs and time?

Participation: How do employees participate in planning, developing and implementing your active living program? How do you build a partnership between the individual and your organization or the organization and the community?

5.2 PLANNING AND DEVELOPING YOUR SOCIAL MARKETING STRATEGY

Planning and developing an effective marketing strategy involves:

- Step One Identifying your target market
- Step Two Setting your goals and objectives

| | |
|------------|---------------------------------------|
| Step Three | Selling the benefits of active living |
| Step Four | Developing messages and materials |
| Step Five | Evaluation |

STEP ONE: IDENTIFYING YOUR TARGET MARKET

The workplace is made up of many sub-groups; for example, shift workers, managers, line workers, employees in remote locations, volunteer leaders, family, and retirees. In order to develop messages and choose communication tools that will appeal, you must break the workplace into small groups who share things in common. The results of your organizational analysis and employee survey will assist you and your planning team by providing information relevant to identifying your target market; for example, demographics, behavioural characteristics and activity preferences. Keep in mind other influences which you may not have yet determined, such as the effects of peer pressure, the social environment and workplace policies.

STEP TWO: SETTING YOUR GOALS AND OBJECTIVES

In the workplace setting, the basic objectives of your marketing effort could be any or all of the following:

- To encourage employees to participate
- To motivate participants to achieve individual goals
- To convince top-level management that the program is effective and critical to the long-term financial health of the organization
- To improve the image of the corporation through the visibility of the program.

STEP THREE: SELLING THE BENEFITS OF ACTIVE LIVING

To motivate people, you must convince your target audience that they will benefit by participating in your program and/or changing their behaviour. You do this by showing how your program can meet their needs.

Your active living program may have more than one benefit. For example, if your target group is older workers, less restricted activity and better quality of life may be more important than a longer lifespan. Other tactics for "hard-to-reach" target groups are included on the following pages.

Generally speaking, however, your marketing efforts promote intangible benefits, such as the long-term results of adopting active living. Since these are difficult for most people to visualize, they may have trouble justifying the price of adopting new behaviours. To overcome this, you may find that employees respond well to rewards or incentives to get them over the short haul when the benefits of their efforts may not be obvious. They see them as small but important ways to recognize their efforts. Refer to the Program Mix chapter for incentive ideas.

STEP FOUR: DEVELOPING MESSAGES AND MATERIALS

Create a mix of communications tools and tactics and decide how best to use them to get your message to your target group(s). Together they should form an integrated strategy of promotions, events, and one-to-one interactions.

Just as you can say the same thing in different ways, you can also find different ways to let the message of your active living program "speak". One may work better than another. This is the time to find out which works best.

STEPS TO SUCCESSFUL MARKETING

Listen and learn. Learn as much as possible about the groups your program is designed to serve. Work with members of your target groups to develop programs and messages which will appeal to target audiences.

Involve employees. Don't just "target" special groups but work with them. Involve them in your planning as much as possible. Recruit them as volunteers and invite them to be members of committees. By involving them you will learn more about the group, the approaches and tools which are likely to work, and barriers which might affect the group.

Break down the barriers. Ask the group what they want rather than telling them what they need. Ask how they can help and if you can help them. This approach works because it gets people actively involved in issues related to their health, and is non threatening. Their first reaction is to assume they will not be understood. You need to break down that barrier and assure them that you are interested and committed to working with them.

Create Partnerships. Work together with other groups, both within your company and the community, to promote a consistent message.

5.3 TARGETING THE "HARD- TO-REACH"

As discussed in the general marketing strategy, employees are more likely to participate if active living initiatives are designed to meet their particular needs, concerns and interests. Let's take a look at tailoring your programs to reach some of the "hard to reach" target groups.

A. SENIOR AND MIDDLE MANAGEMENT

When targeting the senior management group, incorporate the results of the management interviews. What are their interests? Priorities? Level of awareness as to the benefits of active living both to themselves personally and to the organization? Despite the glut of cost-benefit research, senior management still need other reasons for supporting active living initiatives.

Middle management, who are often caught in the middle, remain relatively uninformed about the benefits of active living. They can be resistant to initiatives which take employees away from their work unless they see senior management commitment to the program.

To concentrate your marketing thrust and offset this lack of awareness:

- Address any concerns supervisors have about the program or specific ways they want their employees approached
- Work with the occupational health department to collect and present current financial expenditures related to ill health and health care costs, such as Worker's Compensation Board claims, medical claims, lost work days due to ill health or injury
- Educate management about the benefits of active living programs through upbeat presentations
- Position active living as a safety tool to reduce accidents in the workplace
- Arrange for senior managers to speak with managers in other companies which have implemented active living in the workplace
- Appeal to the personal interests of senior and middle management, such as improving their golf game or enhancing concentration through exercise

- Offer stretch breaks as a service during long meetings
- Spend time on one-on-one recruitment.

B. PRODUCTION OR "BLUE-COLLAR" WORKERS

Production and industrial workers are generally less involved in physical activity than are other employees. Security and safety are their primary concerns. Also, many are unaware of the benefits of physical activity as an answer to the problem of fatigue. Reluctance to participate in active living programs may also stem from poor communication between blue-collar workers and management.

Surveys have indicated that production workers often prefer group, team or family activities. For example, programs featuring touch football, lunch hour table tennis games and hockey tournaments have attracted many from this group. The following ideas will help you encourage this "hard-to-reach" group to participate. Patience is important.

- Develop a good working relationship with labour leaders
- Ensure the work environment has addressed health and safety issues
- Detach the program from management if necessary and identify it with union support and involvement
- Keep communications clear and use limited health jargon
- Use a personal approach to develop trust and rapport; be consistent and respect group norms
- Involve the workers in creating and planning practical programs
- Promote team and group socializing, and make it fun
- Organize inter-group competition
- Offer a morning warm-up stretch and regular stretch breaks for those who do repetitive work or sit for long periods of time
- Have workers who are respected by co-workers promote the program
- Create high visibility campaign promotions and publish co-workers successes.

C. SHIFT WORKERS

Marketing efforts should recognize the unique stresses imposed by shift work and offer specialized promotion on coping with the shift system, rather than trying to change it. Rotating shifts is a lifestyle, not just a work schedule.

What to do:

- Focus on practical information, such as the impact of active living on improving sleep difficulties and maintaining alertness on the job, and how to share active living with the whole family and fit it into the shift schedule
- Develop your program with help of employees
- Make time for group discussion to share coping techniques and provide social interaction
- Include spouses in the program
- Present the program at a convenient time for each shift
- Make a point of stopping by employees' work areas to get acquainted. This may mean being on site for all three shifts.

D. GEOGRAPHICALLY DISPERSED OR MULTI-SITE WORKPLACES

Included in this target group of "hard to reach" employees are those working for a multi-site employer, as well as those who work out of the office in one capacity or another, be it as a daytime courier, a

bus driver or a travelling sales representative. The keys to successfully marketing initiatives to these employees require a diverse means of communication, and a comprehensive and dedicated network of volunteers.

Active living choices in the incentive program of a multi-site company with locations extending into the far north include snowshoeing, ice fishing, snowmobiling and hunting as eligible activities towards earning awards. An enthusiastic team of volunteers has been set up to encourage and support the program at each worksite. Their input and ongoing review assure that the program appeals to those in northern locations and provides equal opportunities for all employees.

Other marketing strategies that appeal to geographically dispersed employees and help to make them feel part of your company's program may involve the following:

- Recognize local representatives who guide the program's direction through newsletter profiles
- Travel to multi-site locations; for example, visit drivers at turn-around spots on bus or taxi routes to establish personal contact with those employees
- Design an "active life package" containing ideas *for* activities that can be done in hotel rooms or during long driving routines; for example, tubing exercises, stretch breaks, listing of hotels and community centres with exercise facilities, walking routes
- Provide video resources for home use and travelling
- Encourage family support and involvement in program planning.

E. OLDER WORKERS AND RETIREES

Reaching those workers who are close to retirement, as well as those already retired, requires special marketing approaches, ones which target their needs without making them feel singled out. One way to do this is to design program brochures which illustrate active people of all age groups.

This group of workers seem to feel that work is only for working. A "you don't have to get dressed up or spend a whole hour" lunchtime activity program can attract employees from the "old school" work ethic.

Marketing messages that focus on trimming down or firming up don't carry as much effect as messages aimed at quality of life. Older people respond more strongly to messages that active living will help them maintain independence as they age. Also, this group has a strong connection with physicians as authority figures, so having a medical figure promote your program may be effective.

Other approaches to market your active living program to older adults include:

- Training adults to lead scheduled active living events for their peers
- Inviting spouses to participate
- Including physician examinations or other form of physician involvement
- Offering health-related support groups such as arthritis support groups
- Using incentives designed to achieve non-competitive, personal goals
- Offering a variety of moderate exercise activities such as aquatic programs, square dancing, lawn bowling and walking programs
- Having the company president mail a letter to the employees at their homes indicating support of the active living program
- Dressing appropriately when leading exercise activities.

F. WORKERS WITH A DISABILITY

Workers with a disability in the workplace have, in the past, been mostly excluded from participation in worksite programs, either through their own perceived barriers or due to a lack of understanding of their needs, interests and abilities on the part of program coordinators. Active living initiatives can open the doors and invite persons with a disability to participate fully.

When marketing to this diverse group, you must take into account that:

- People with a disability who participate in physical activities are less likely to participate in structured activities that are regularly scheduled, directed by an instructor and competitive. They are more likely to participate alone
- People with a disability cite fear of injury and lack of skills as barriers to increased activity, as well as cost, accessibility and lack of sensitivity towards their rights, needs and interests

Here are some suggestions for promoting active living to your workers with a disability:

- Promote your initiatives in a variety of alternate media formats
- Promote a fee structure where people with a disability pay a reduced rate for activities and events
- Use positive role models and appropriate image depiction of people with a disability in promotional messages
- Emphasize a person's capabilities and preferences
- Ensure that leadership training opportunities are available and accessible
- Involve persons with a disability in planning programs, choosing activities of interest and advising on specialized equipment needs
- Promote the range of benefits of active living; for example, increased flexibility and balance which help the person carry out daily living activities with less fatigue and frustration and greater safety
- Promote participation options which are personally challenging and demanding; for example, wheelchair basketball (offering both segregated and integrated games), adapted yoga and exercise classes, water sports, skiing, horseback riding, archery, and rhythmic gymnastics
- Involve management in organizational planning and policy development to improve accessibility to and encourage participation in active living options (for example, adapted showers/change rooms).

G. FAMILIES

Natural support systems provided by families, friends, and co-workers are an essential component in promoting active living. For example, Heinzelmann and Bagley showed that a husband's adherence to an 18-month exercise program was directly related to his wife's attitude towards the program. Eighty percent of men whose spouse had a positive attitude toward the program showed good or excellent adherence patterns, in contrast to forty percent of men whose spouses' attitude was neutral or negative.

Companies may find it difficult to include dependents in on-site active living programs because of logistical problems. However, logistics need not prevent programs from marketing this important support group.

Here are some things you can do to encourage and enhance family active living:

- Send health education material to the home

- Offer short-term family counselling through a corporate employee assistance program
- Set up an "idea board" where people can describe their active living pursuits with family and friends and others can get ideas
- Offer seminars/events with family appeal and hold them on weekends or during the evening
- Provide training on how to give and receive support
- Develop home exercise programs
- Promote community events and offer partial reimbursement of entry fees for family members
- Include family members as eligible participants in active living incentive programs
- Provide a resource library with take-home videos and self-help materials
- Organize active living events where family members and friends can come into the workplace and participate.

6. CARRYING ON

Planning and launching active living in the workplace is one thing; maintaining ongoing involvement is quite another matter. Identifying problems which might cause people to drop out of a program and providing solutions to these problems can go a long way towards reducing the drop-out rate. Your answers to turning problems into solutions will be provided by professional leadership and the guidance and involvement of your participants.

Because individuals pursue an active lifestyle for a multitude of reasons, those coordinating active living programs must be armed with a variety of tools to motivate participants to "stick with it." As people need to be cajoled and rewarded, motivational techniques can help to make or break a program. However, this should not obscure the fact that the ultimate aim is to have active living "be valued and integrated into daily life."

Dr. George Sheehan has an expression for those who are rewarded by the intrinsic joys of active living. "For them, exercise is not a test but a therapy, not a trial but a reward, not a question, but an answer."

6.1 MAINTAINING MOMENTUM (MOTIVATION AND ADHERENCE)

Several factors help promote adherence to an active lifestyle. Consider the following when attempting to sustain the interest and involvement of employees:

Positive environment. A corporate culture that encourages regular participation will get it. Senior management commitment — and active involvement— are important. So are reasonable work demands and schedules that allow employees to participate at times of their choosing.

Another aspect of creating a positive environment involves the physical environment such as keeping facilities and equipment up-to-date, clean, and in good repair, ensuring adequate health and safety conditions, making showers and changing rooms available, and providing an inviting outdoor environment.

Consideration of cultural differences. The cultural background and the life circumstances of individuals will affect their degree of overall interest and the particular types of activities that appeal to them. To sustain the interest of a variety of cultures, develop programs that are user-friendly and culturally sensitive by seeking employee input from the beginning.

Creative and fun programming. While employees may join a program because it is "good for them," few will stick to it for any length of time unless it is enjoyable and satisfying. Encourage laughter and other expressions of involvement while creating an "esprit de corps" within each activity so each individual feels that he or she belongs to the group.

Monitor progress. Keeping track of employee participation rates, getting feedback, and just generally keeping in touch with whether your program initiatives are contributing to positive changes in the corporate culture is important.

Recognition and reward. Short-term incentives and rewards are no panacea but they do help some

people through the early, often difficult, stages of lifestyle change. A regular evaluation of goal achievement and the setting of new goals once the initial targets have been met will help develop people's confidence in their ability to successfully reach personal goals.

Strong leadership. Effective leaders are uplifting, enthusiastic, and inspiring. They recognize each person as an individual with unique differences. Creating a non-threatening environment, providing social opportunities, and offering personal attention will go a long way in maintaining individual adherence.

Family and peer support. One of the main reasons people commit to an activity program is because friends and family enjoy and active lifestyle and encourage their participation. Studies suggest that group support and the social atmosphere of an activity reinforce adherence.

Knowledge of purpose. The educational component should be part of a support system for promoting adherence. It is just as important for your participants to know why they are exercising or making other behaviour changes, and to understand how it will help them feel good about themselves.

Opportunities to “escape.” Using nature can provide physical and emotional release. Active Living can be used as an instrument of recuperation and escape from the pressure of work intensity.

Personal challenge. Acquiring a certain skill level over time, for example, will result in an enhanced feeling of competence, worth, and self-expression, which will encourage an increasing sense of commitment to being active.

Environmental citizenship. Studies have shown that over 80 per cent of Canadians want to do something for the world around them. Organizing environmentally friendly activities will afford them a satisfying purpose to stay involved.

APPENDIX A: WORKSHEET

CREATING A MISSION STATEMENT

You may find that your mission statement will be more balanced and easier to work with if you break it down into the specific roles of your active living program and the goals you want to accomplish in each area.

Ask the following questions:

1. What is the role of active living to:

A) the organization? _____

B) the employee group(s)? _____

C) the community? _____

D) you and your employee committee? _____

2. What are the values of:

A) the organization? _____

B) the employee population? _____

C) the community? _____

D) you and the employee committee _____

3. What are the results you are seeking with your active living initiative? _____

4. What are the results the organization is seeking? _____

5. How will an active living program contribute to the achievement of those results?

6. What are the barriers to achieving those results? _____

7. What needs to be changed in order to overcome the barriers? _____

Your mission statement:

To (action verb) (single key result) by (the method by which you are going to achieve the result) and (what it will look like when you get there).

APPENDIX B

THE CORPORATE CULTURE AUDIT

A successful active living initiative is a workplace-wide affair. Without broad-based physical, psychological and social organizational support, there is no place for an active living program. How can you tell if your company is ready for active living? Answer true or false to the following:

| | TRUE | FALSE | The organization I work in promotes: |
|----------------|-------------|--------------|--|
| 1. | _____ | _____ | A clearly stated mission, purpose, and goals and a tie-in of the active living program objectives to these |
| 2. | _____ | _____ | Employee involvement in development, implementation and improvement of the active living program |
| 3. | _____ | _____ | Active living policies and procedures such as flex time, subsidy programs |
| 4. | _____ | _____ | Ways to include widespread participation in active living at work and at home, including family, people with a disability, and older workers |
| 5. | _____ | _____ | Quality programs and services |
| 6. | _____ | _____ | Environmental citizenship and provides accessibility to "green and clean" outdoor spaces |
| 7. | _____ | _____ | An attitude that its employees are appreciated and recognized for a job well done |
| 8. | _____ | _____ | Effective leadership training development |
| 9. | _____ | _____ | Collaboration, effective communication channels, and partnerships within the workplace and the related active living organizations |
| 10. | _____ | _____ | The broader concept of active living by offering a wide range of opportunities and services |
| 11. | _____ | _____ | Changing negative cultural norms to positive ones |
| 12. | _____ | _____ | Researching and monitoring workplace initiatives |
| SCORING | | 0 -3 | Your company is not paying attention to its human |

resources . . . a major boosted is needed.

- 4 -6 Your company needs to decide which way to go and stop sitting on the fence when it comes to change.
- 7- 9 Your company has a lot of potential. Keep listening and moving forward.
- 10 -12 You have an active living company led by "leaders."

**APPENDIX C
CULTURAL NORMS TEST
ANSWER "YES.. OR "NO.. TO THE FOLLOWING STATEMENTS**

Each begins with the phrase: "It's normal around here. .."

| | YES | NO |
|--|-----|-----------------|
| 1. for people to carry extra fat weight | | ___ - ___ |
| 2. to drink coffee throughout the day because it's always available | | ___ - ___ |
| 3. for people to use their cars to go short distances | | ___ - ___ |
| 4. for people to ride the elevator two or three flights instead of using the stairs | ___ | ___ |
| 5. for people to sit for a long time in meetings without a stretch break | | ___ - ___ |
| 6. to drive to work rather than car-pooling, taking the bus, or riding a bicycle | ___ | ___ |
| 7. to think you're weird if you take time out to stretch or close your eyes and relax several times throughout the day to calm yourself | | ___ - ___ |
| 8. for people to go regularly to the company doctor for aspirin and other minor physical pains | ___ | ___ |
| 9. for people to get used to an almost constant level of stress and tension | ___ | ___ |
| 10. to get positive reinforcement for being rushed, harried or drawn in appearance because the more harried you appear, the harder you must be working | ___ | ___ |
| 11. for people to feel trapped in their work and unable to balance work and leisure | ___ | ___ |

- | | | | |
|-----|--|-------|-------|
| 12. | that the only people who take a break during the day are those who have to leave the building for a smoke | _____ | _____ |
| | | - | |
| 13. | for people to complain of a sore back and neck | _____ | _____ |
| | | - | |
| 14. | for people to stay in their offices during lunch hour and continue working, instead of taking a break by getting outdoors and being active | _____ | _____ |
| 15. | for supervisors and co-workers to encourage active living practices | _____ | _____ |

**APPENDIX D
MONTHLY OPERATING BUDGET**

| MONTH/YEAR | | | YEAR-TO-DATE | | |
|----------------------|--------|----------|--------------|--------|----------|
| BUDGET | ACTUAL | VARIANCE | BUDGET | ACTUAL | VARIANCE |
| Revenues: | | | | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| Expenditures: | | | | | |
| Staff: | | | | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| Office: | | | | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |
| _____ | | | _____ | | |

| | | |
|-------|--------------------------------|-------|
| _____ | Occupancy cost (rental, lease) | _____ |
| _____ | Resource materials | _____ |

Facilities and Equipment:

| | | |
|-------|--------------------------------|-------|
| _____ | Occupancy cost (rental, lease) | _____ |
| _____ | Rental/lease of equipment | _____ |
| _____ | Staff uniforms | _____ |
| _____ | Supplies for fitness testing | _____ |
| _____ | Records and tapes | _____ |
| _____ | Film rental | _____ |
| _____ | Other expenses | _____ |
| _____ | Depreciation | _____ |
| _____ | Insurance | _____ |
| _____ | Interest/debt service | _____ |

TOTALS

| | | |
|-------|--------------------|-------|
| _____ | Total Revenues | _____ |
| _____ | Total Expenditures | _____ |
| _____ | Variance | _____ |

APPENDIX E: SAMPLE OF TERMS OF REFERENCE FOR ACTIVE LIVING EMPLOYEE VOLUNTEERS

1. **Authority** -The active living volunteer team is established by the ABC Department.
2. **Mandate** -The mandate of the active living volunteer team is to provide input from work groups/departments and ensure that the active living program reflects the needs and interests of employees in all departments.
3. **Membership** -The active living volunteer team is comprised of active living representatives (active living reps) from all company work areas. Employees volunteer to represent their work areas with their supervisor's support. Active living reps are designated by the active living program manager and/or active living advisory committee when they volunteer and when they meet the criteria for an active living rep. Departmental managers are informed of the active living reps in each work area.
4. **Criteria for active living volunteer reps**
Active living reps:
 - Volunteer to represent their work areas
 - Have the approval of their supervisors to represent their work area
 - Are designated by the active living program manager/active living advisory committee
 - Are prepared to commit 2-3 hours per month to promote active living in the workplace
 - Recognize that active living is an integral part of personal well-being
 - Are role models to promote active living in the workplace
 - Have attended an active living orientation session.
5. **Responsibilities of active living reps**
 - To attend active living team meetings a minimum of four times per year to represent their work area, and to provide input for the development of an active living program.

development of an active living program

- To identify and orientate an alternate employee in the work area who will cover during vacations and other leave
- To act as liaison or information-exchange agent with the active living program manager/advisory committee by receiving information from the program office regarding active living and providing information to the office regarding work area needs and interests
- To secure a designated place in the work area to display active living promotional material
- To disseminate information provided by the active living program office to all employees in their work area by displaying brochures, hanging posters, distributing newsletters, promoting events, and so on
- To assist in organizing active living activities in the work area such as lunchtime demonstrations, noon-hour walking groups, and so on
- To stay current with active living program policies and procedures

- To maintain employee confidentiality regarding personal issues
- To network with other active living reps
- To provide feedback to the active living program office on program activities
- To compile an active living information binder for reference purposes.

6. Responsibilities of the active living program manager

- To designate, orientate, provide training to and support active living reps
- To provide active living resources to active living reps and assist in coordinating active living initiatives in the work areas
- To arrange active living volunteer team meetings for the purposes of planning, support and training
- To select a member of the active living volunteer team to sit on the active living advisory committee
- To recognize, commend and support active living reps and the active living volunteer team in appropriate ways.

APPENDIX F: SAMPLE JOB DESCRIPTION FOR AN ACTIVE LIVING PRACTITIONER

PART 1- IDENTIFYING DATA

Position No.: _____

Department/location: _____

Working Title: _____

Branch/Unit: _____

Supervisor: _____

PART II -SUMMARY (BROAD STATEMENT OF POSITION'S ROLE)

Reporting to the (supervisor position) _____

the incumbent plans, designs, implements and evaluates active living initiatives and provides consultation related to active living in the workplace.

A. Duties and Responsibilities

1. Provides active living information, education and skill development programs by:
 - Designing, administering and analyzing employee needs assessments and program evaluations to determine program requirements
 - Designing information, education and skill development programs to reflect needs assessment and program evaluation results
 - Conducting active living events, courses, active living leadership workshops, displays, etc.
 - Responding to requests from identified target groups and scheduling activities, staff and volunteers
 - Consulting with professionals in the company, outside organizations and the community regarding active living
 - Working with a broad cross-section of people to develop programs and activities that encourage all employees' participation and self-motivating behaviours.

Approximate % of job time major function is performed: ____%.

2. a) Provides consultation to individual employees, groups of employees, union representatives and supervisory/management personnel regarding active living by:
 - Interpersonal communication with employees regarding active living
 - Provide safe fitness assessments and confidential consultation regarding participants' results
 - Promoting employee orientation to active living and effective communication with the company.

Approximate % of job time major function is performed: ____ %.

b) Implements the annual communication campaign by:

- Planning and scheduling promotional productions and news releases
- Cooperating with pertinent departments such as printing and public affairs to develop media material
- Planning, implementing and evaluating innovative methods for communicating and promoting the program to employees
- Cooperating with unions, employee groups, corporate departments and community services to implement the campaign
- Developing promotional materials for the active living program

- Preparing and presenting summarized reports to management, employee advisory committee and volunteers.

Approximate % of job time major function is performed: ____%.

c) Provides active living resources to employees by:

- Reviewing, evaluating, developing and producing appropriate resource material
- Employing various instructional methods to deliver resource information
- Developing plans to create outdoor environmental resources to support active living opportunities
- Maintaining contact with provincial and national services for supplying resource materials
- Cataloguing, distributing and monitoring appropriate resource materials
- Maintaining a resource library
- Applying current literature and research on active living in the workplace.

Approximate % of job time major function is performed: ____%.

d) Maintain professional development by:

- Attending educational and training events to enhance personal knowledge and skills in adult learning principles, marketing and promotion techniques, human resource management, financial management, programming and facility management (if applicable)
- Reviewing current literature and networking with active living professionals to remain current in the field and principles of workplace active living.

Approximate % of job time major function is performed: ____%.

3. Examples of additional activities which may be performed from time to time:

- Researching information as required, establishing data collection and record keeping systems to provide required data/information.

4. Approximately how long will it take for a fully qualified employee from outside the work unit to reach the full working level of the position?

At least ____ months.

B. Qualifications (should directly relate to the program's focus)

Education/Experience Background

- Community recreation leader
- Certified coach
- Fitness and lifestyle appraiser/athletic therapist
- Certified exercise class instructor
- Kinesiologist
- Physical/health educator
- Facility administrator
- Nursing professional

Skills/Certification

- Strong leadership skills and the ability to communicate effectively with employees at all levels of the company

- CPR/First Aid certification
- Skills Program for Management Volunteers
- Programming for special populations disabled, older adults
- Facility management (if applicable) and business skills

C. Lines of Authority

1. Describe the way in which this position receives direction:
 Direction is provided by the Manager, _____(dept) _____ in response to program proposals and recommendations submitted.

2. What policies, procedures, or established practices guide, constrain, or limit the activities of this position? Examples:
 - Employee assistance policy
 - Occupational Health and Safety Act
 - Personnel policy manual

3. How is the work of the position normally evaluated?
 Individual works with considerable independence. Work would be evaluated on the increased usage of the program, program profile and feedback from employees.

4. What types of decisions are normally referred to the Supervisor? (Give examples)
 Decisions related to policy, budget and personnel:
 - Increased expenditures required in specific program areas
 - Service contract required for training programs.

D. Financial Accountability

This position has input into the budget, providing background information and preparing and presenting plans for the fiscal year.

The budget is prepared by the _____ (manager) _____ with the background information and statistical data provided by the incumbent.

E. Management/Supervision of Human Resources

_____ No supervisory duties

_____ Supervisory duties

a) Number of positions supervised directly:

_____ Volunteers

_____ Permanent

_____ Part-time/casual

b) Number of position supervised indirectly:

_____ Volunteers

- _____ Permanent
- _____ Part-time/casual

c) Nature of supervision:

- _____ Orientation and train volunteer/staff
- _____ How to do tasks
- _____ Develop job descriptions and workplans
- _____ Assign work and review for quality/quantity
- _____ Establish performance standards and evaluation process
- _____ Monitor feedback and job performance
- _____ Volunteer/staff recognition activities
- _____ Chair advisory committee and active living teams
- _____ Other

F. Key Personal Contacts

| Who (what position or groups) | Purpose | Frequency |
|---|---|--------------------|
| Employees | consultation education skill development encouragement | daily |
| Volunteer Activity Leaders | consultation planning assistance | weekly or daily |
| Management | consultation collaboration | monthly |
| Advisory Committee | consultation | monthly |

planning
assistance

Other active living
professionals

collaboration
advice

monthly

APPENDIX G: 12-MONTH THEME CALENDAR

JANUARY

READY-SET-GO

New Year's resolution get-started activities:

- Offer educational sessions for beginners who want to start active living programs
- Begin indoor mall walking programs
- Promote and initiate individual counselling service for those wanting to begin physical activity programs
- Offer goal-setting incentive programs
- Offer physical fitness testing
- Holding an Open House/New Year's resolution week to include:
 - Sports equipment display
 - Active living activity demonstrations such as tai-chi, indoor gardening
 - New Year's ribbon-cutting ceremony
 - Sale of sports shoes and active wear
 - Registration for winter sports leagues such as curling, hockey and bowling
 - Community organizations/facility displays such as YMCA, Heart and Stroke Foundation
 - Outdoor events such as snow sculpture contest, tobogganing and sleigh ride activities

FEBRUARY

DANCE FOR HEART

- Participate in Dance for Heart, an aerobics fund raiser sponsored by the Heart and Stroke Foundation
- Organize a company curling bonspiel or bowling party
- Offer dance classes in old-time dance, highland dance
- Offer an on-site CPR course for families
- Launch a Sweet Hearts Smoking Cessation Program
- Arrange pay day demonstrations in tai-chi, martial arts, ribbon dancing
- Discover the great indoors with an indoor scavenger hunt, inside croquet or golf, an inside picnic event, weekend cultural tour of library/museums
- Organize a snowshoe can-can contest

MARCH

FUEL YOUR ACTIVITY MONTH

- Organize a "Fit Fest" team challenge
- Stage a fund-raising bicycle tune-up service
- Stage a pot-luck lunch with active living wear fashion show
- Plan a Hawaiian beach party at a local pool complete with palm trees at pool side and water polo with inner-tubes
- Organize a get-away fitness cruise for employees
- Invite a local gardening expert to speak on successful gardening techniques

APRIL

SPRING-TUNE UP

- Organize "Spring Tune-up" fair with check-out stations for running shoe tread, blood (valve) pressure, heart (engine) health, and so on. Involve community groups and company

departments

- Contact the Cancer Society for Cancer Month events
- Stage a Spring Flowers Scavenger Hunt
- Hold a kite building contest and kite launching event

MAY

NATIONAL PHYSICAL ACTIVITY MONTH

- Take part in "May Madness Marathon Month," an activity incentive challenge organized as part of National Physical Activity Month
- Hold a noon-hour bike maintenance workshop
- Take part in SummerActive programs; offer prizes and a lunch-hour walk
- Hold a "best executive legs" contest

JUNE

FRESH AIR MONTH

- Contact Environment Canada about Environment Week
- Plug into Occupational Health and Safety Week
- Encourage "fresh air" cycling or walks to work followed by a barbecue
- Recruit teams for the YMCA Corporate Challenge Week
- Plan a summer activity program to include scuba diving, sailing, canoeing and rafting events
- Hold a clean-up event for debris in surrounding grounds or local park

JULY

WATER SAFETY AWARENESS MONTH

- Contact the Canadian Red Cross Society for information on water safety
- Offer water activity courses for sailing by the stars, scuba diving, paddling techniques for canoeing, rowing and kayaking
- Organize an outdoors safety camp with tips for activities such as boating and camping, with help from the health and safety department

AUGUST

GREAT OUTDOORS MONTH

- Hold a company family picnic with volleyball, softball, horseshoe pitch, face painting, tug-of-war, clowns, and more
- Plan a golf tournament preceded by a noon-hour session with a golf pro
- Plan a "Shorts and Shades" walk followed by a pot-luck beach party
- Arrange camping and hiking adventures for employees' families

SEPTEMBER

FALL INTO FITNESS

- Support family participation in the Terry Fox Run
- Hold a "So long to Summer" barbecue
- Plan a fall program kick-off and promotional events such as membership draws for reduced rates at community facilities or coaching clinics
- Arrange a "Collecting the Colours of Fall" scavenger event
- Hold a "Theatre Under the Stars" talent show event

OCTOBER

"TALKING BACK" MONTH

- Plan a "Back to Work" care program in conjunction with the Occupational Health Department
- Sponsor physical activities Focussing on exercise and back safety
- Contact the Worker's Compensation Board for information on back care at work
- Promote frequent stretch breaks
- Plan a special theme day to celebrate Halloween with healthy trick-or-treat samples and pumpkin draws

NOVEMBER

TURKEY-TROT MONTH

- Take part in "The Turkey Trot", a two-week activity incentive challenge
- Hold an educational session on being active in the cold weather
- Hold a pre-ski tune up, for equipment and bodies

DECEMBER

HEALTHY HOLIDAYS

- Hold a "Gift of Christmas" carolling and walking tour to gather toys and food for needy families
- Stage "The Twelve Days of Fitness" with activities to get people through the holiday season
- Hold annual incentive awards and recognition events
- Take part in the "Turkeycise" annual activity challenge

APPENDIX H: SAMPLE FITNESS TESTING INFORMATION SHEET

FITNESS ASSESSMENT- DOES IT HURT?

The fitness assessment is not a test. You don't have to be fit to participate. For beginners in a physical activity program, the results will help to guide you to the first steps in evaluating and improving your health. For regular exercisers, it will indicate whether or not your activity is contributing effectively to your health.

"Fitness" includes a number of components that can be assessed. Among these are cardiovascular fitness (how fit your heart and lungs are), flexibility, muscular strength and endurance. A measure of body composition, as a indicator of nutritional habits and unhealthy fat distribution, provides an additional valuable measure.

A fitness assessment can take many forms. The following list of measurement techniques describes some that will be used to measure your present level of physical fitness. Remember, you can always pick and choose which of the measures you want to do.

- 1) Resting Heart Rate and Blood Pressure are taken to determine baseline values and as indicators of hypertension and related stress.
- 2) The Canadian Standardized Test of Fitness (CSTF) consists of a series of stepping sequences performed on double steps to the count of a musical rhythm with a progressive increase in tempo. The aim of this test is to determine the rate at which your body can take in and use oxygen. An estimate of overall aerobic fitness is indicated in your results.
- 3) A measure of Flexibility, specifically of your hamstrings and lower back, will be taken. If the muscles and associated tendons and ligaments that surround the joints of the body are flexible and supple, the various physical movements of everyday bending, reaching, pulling, or twisting can be done with ease and without injury.
- 4) Muscular Strength and Endurance can be tested with push-ups that are performed consecutively. Another measure can be made from performing curl-ups. The results can be compared to same age and sex norms.
- 5) Your Healthy Weight is calculated with a formula called the Body Mass Index (BMI) which uses your weight and height measurements. The BMI introduces the concept of a range of weights that can be healthy for a person. BMI measures fatness and is related to the development of certain health risks. BMI allows the measurer to observe the relative contribution of muscle to overall body weight and to note the distribution or placement of fat and muscle. The procedure includes a few skinfold measures (painless pinches) and two girth measurements.

Where do you sign up?

Sounds painless, doesn't it? If you would like to take part in a fitness assessment, please follow these requirements. Do not eat a large meal, ingest caffeine or alcohol, smoke, or exercise within two hours prior to your assessment. If you are at risk for such a test, you will be screened at the start. Shorts and t-shirt (no tights or leotards) and running shoes are

needed. The time period will be about forty-five minutes, so allow time to change. Registration will be by specific time slots to enable you to fit it into your work day.

Register with _____
(name)

by calling _____
(phone)

The last day to register is _____
(date)

YOUR REMINDER NOTICE – FITNESS ASSESSMENT

NAME: _____

DATE: _____

TIME: _____

LOCATION: _____

The following preparations on your part are necessary to ensure a safe and accurate assessment.

1. Please arrive 10 minutes prior to your appointment in order to change.
2. Come prepared with shorts, t-shirt and running shoes (no tights or leotards).
3. Sweat pants may be worn as a cover-up over shorts, but the calf and upper thigh will need to be lifted for girth and skinfold measurements.
4. Please refrain from alcohol, caffeine, eating a heavy meal or smoking two hours prior to assessment.
5. Bring to appointment the following: signed consent/waiver form and completed pre-test screening portion of the CSTF data sheet.

We look forward to seeing you

APPENDIX I: ACTIVE LIVING CHALLENGE

SAMPLE PROMOTIONAL LETTER FROM MANAGEMENT

Take the Challenge

Physical activity plays an important part in all our lives.

For that reason, the active living employee committee encourages all (company) employees to take the challenge and participate in our active living challenge event. Designed to promote participation in enjoyable and varied activities, and to encourage employees to adopt an active living lifestyle, the active living challenge will run for ____ weeks during national physical activity month in May. This is a good time for all of us to become more active, to accept responsibility for our health, to experience the value of regular physical activity, and to have fun.

Participants will earn challenge points for various activities and good health practices. The aim is to reach ____ points during the two-week period.

The team/division with the greatest percentage of participants will receive the Challenge Cup.

In addition, a number of special events are planned, including information seminars, demonstrations, displays, films and special challenges.

Active living volunteers will serve as the prime movers and will soon be passing out details on how to register and take part in the active living challenge. Individuals can register on their own or form teams.

There's no time like the present to turn thoughts into actions. Take the challenge and join in the experience of active living.

F. Stewart
Vice-President
Human Resources

SAMPLE GUIDELINES: ACTIVE LIVING CHALLENGE

Active living challenge scorecard

Name: _____

Team Name (if applicable): _____

1. Read the PAR-Q sheet and follow the directions. It is designed for people interested in changing their daily activity levels.
2. Use the calendar below to keep track of your challenge points. Record how you earned your points and your daily total.
3. Active living challenge point system
Challenge points will be awarded for participation in those activities noted in the

accompanying

list: "Canada 125 and Active Living - Two Reasons to Celebrate.". Some of the activities listed may not apply at this time of year.

The duration of each activity must be at least 15 consecutive minutes. If you walk for 30 minutes, this accounts for 1 point, not two. (* Note: You may want to devise a point system that awards more points to the more vigorous activities and extra points for those activities which positively affect the environment.)

MAXIMUM CHALLENGE POINTS

PER DAY _____ PER WEEK _____

YOUR PERSONAL/TEAM GOAL: _____ TOTAL CHALLENGE POINTS _____

| SUN | MON | TUES | WED | THURS | FRI | SAT | POINTS |
|-------|-------|-------|-------|-------|-------|-------|--------|
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ | _____ | _____ |

CORPORATE CUP

BONUS DAY-POINTS CAN BE ADDED TO TOTAL _____

TOTAL _____

APPENDIX J: WORKSHEET

SOCIAL MARKETING STRATEGY

Step One: Identify your target audience

What is your primary target group? Be as specific as possible, indicating everything you know about your target audience including their physical, behavioural, demographic, and attitudinal characteristics.

Step Two: Establish your goals and objectives

State your goal: (Identify whether this is a short-, medium- or long- term goal)

State your objective(s): _____

Step Three. Identify the benefits

List the benefits of programs and services for your target group.

1) _____

2) _____

3) _____

Step Four: Develop messages and materials

What are the best ways of reaching your target audience and thereby achieving your goals?

Activities: What message and materials provide the best fit for your target audience?

1) _____

2) _____

3) _____

Resources needed: (list people, time needed, support, equipment and budget needed for each activity)

| Tactic | Resources needed | Estimated cost |
|--------|------------------|----------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Review existing materials. Have other groups tried similar initiatives? What have they done? Were they effective? Are the materials available?

Timelines: How long will each tactic take to organize and complete?

| Tactic | Person responsible | Due date | Resources |
|--------|--------------------|----------|-----------|
|--------|--------------------|----------|-----------|

| | | | |
|-------|-------|-------|-------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Potential Problems: (any roadblocks you can think of)_____

Step Five: Evaluation (remember your goals)

How will you measure the effectiveness of your marketing strategy?

Assessment methods:_____

Indicators of success:_____

APPENDIX K: SAMPLE PRE-ACTIVITY EVALUATION FORM

Taken by the individual before participating in an educational course, physical activity, skill development clinic, or other active living initiative.

NAME: _____ COURSE/EVENT _____

We would like to make this program as responsive to your needs and interests as possible. In order to do so, please circle the number that best identifies how you see yourself with regard to the following questions.

1. How knowledgeable are you in this area?
1 2 3 4 5
I know practically nothing I am extremely knowledgeable

2. How motivated are you to improve in this area?
1 2 3 4 5
I am not motivated at all I am highly motivated

3. How close are you to achieving your goal in this area?
1 2 3 4 5
Very far away Very close

4. To what extent do you think you need to learn additional skills in this area?
1 2 3 4 5
I don't have any skills I have all the skills I need

5. How much support do you have for making improvements in this area?
1 2 3 4 5
People are actively against my success. I have lots of people who will support me.

6. How urgent do you believe it is for you to improve in this area?
1 2 3 4 5
Not urgent at all Very urgent

7. How confident are you that you will succeed in making improvements in this area?
1 2 3 4 5
Not at all confident Extremely confident

8. How many times in the last two years have you attempted to change in this area?
1 2 3 4 5

ACTIVE LIVING PILOT PROJECT

SUMMARY EVALUATION SURVEY

Please take a few minutes to complete the following survey. Your comments and feedback are important towards evaluating the now-completed pilot project for your department. Thank you.

Please send it to _____ by _____(date)

Name (optional): _____

(1) Which of the following activities did you participate in?

- Active living challenge
- Walking club
- Fitness assessment
- Fitness re-assessment
- Active living incentive program
- Family sports day
- Noon-hour educational sessions
- Sneaker Day

* Note* Non-participants, please answer question 2, A-C

Those who participated, please complete questions 3-7

(2) NON-PARTICIPANTS:

- A. If you did not participate, did you hear about the project from those who did take part?
Yes____ No____
- B. Would you be more likely to take part if active living events were offered again in the future? Yes ____ No____
- C. Have you any comments about what your fellow employees said and/or your reasons for not participating?

PARTICIPANTS:

- (3) Have you started to do something about becoming more physically active since the pilot project began? Yes____ No____
- (4) What changes have you made? Please note the changes.
E.g. began walking to work, made changes to better cope with stress, began to be

active on a regular basis, etc.

(5) Did the pilot project motivate you to make these changes? Yes _____ No _____

(6) Please comment and/or make suggestions about your experience in participating in the active living pilot project and/or its impact upon the working environment.

—

(7) Do you note any of the following? please check if yes.

a feeling of organizational support for active living

a healthier work environment

increased awareness of healthy life practices

improved morale and communication

more personal support amongst co-workers to be active

other: _____

(8) A speculative question. Would you like to see active living opportunities available on an ongoing basis? Yes _____ No _____

Thank you for your input.

From the Active Living Advisory Committee

NOTES

MAKING IT WORK REPRESENTS THE COLLABORATIVE EFFORTS OF MANY TALENTED PEOPLE. WE APPRECIATE THE TIME AND EXPERTISE CONTRIBUTED BY ALL THOSE WHO PARTICIPATED IN THE DEVELOPMENT OF THIS RESOURCE.

THE FOLLOWING PEOPLE DESERVE SPECIAL THANKS:

Kendrith Bentley
Serge Brassat
Suzanne Brassat
Mark Clarke
Stephen Grundy
Bill Izso
Marion Reeves

Making It Work was written by Nansi Cunningham

ISBN 1 -895670-08-X