**IDENTIFYING AND PRIORITIZING EMPLOYEE HEALTH AND SAFETY CONCERNS**

**Session 1**

*Activity 1: Identifying health, safety, and wellness issues for intervention planning*

This purpose of this activity is to facilitate group decision making about which health, safety, or wellness issues should be selected as the focus of future interventions. This activity can be done in a single meeting lasting 60-90 minutes. This duration assumes that the group has already reviewed and discussed data gathered previously from the whole workforce. If not, then be sure to plan time for a feedback session to review results of surveys or focus groups, claims data, and other relevant information about employee health, safety, and wellness.

You may wish to plan for a 2-hour meeting to accomplish both Session 1 (identifying issues) and Session 2 (prioritizing and selecting issues for intervention) in a single working session.

This activity is appropriate for groups that are newly formed or well-established. For newly formed groups, this activity should be introduced after group members have introduced themselves and the group leader has established the purpose, roles, and expectations. It is helpful to have two people facilitating this activity: one person facilitates the discussion, and the second person helps with note or organizing the group materials. An important goal for this activity is to promote cohesion in the group through consensus building and creating shared goals.

**Materials needed**

* Flip chart
* Individual sheets of flip chart paper with a single major theme from prior data collection activities (e.g. focus groups) at the top
* Colored markers
* Black Sharpies (1 per person)
* 4” x 6” Post-it notes (15 per person)
* Summary of focus group results on flip charts and paper

Note: Depending on the type of workplace, it may be helpful to identify issues by department or work site. Alternatively, you can start with BLANK flip chart papers.

**Group process**

1. Review broad areas of concern from the data gathered (e.g. stress, injured backs or shoulders, work organization, general health, etc.)
   1. These areas should come from analysis of data collected from focus groups, surveys, or other means. Post several sheets of flip chart paper on the wall with one general topic on each.
2. Give team members a stack of Post-it notes. **Ask them to think of issues or conditions in the workplace that affect their health or that keep them from being as healthy as they would like.**  You can ask them to color-code them by issue. If it is mostly a male population, there may be those who are colorblind, so just have them write them down. If you want to categorize by facility or department, ask them to indicate that category at the bottom of each Post-it they use. Have them write the issues with a Sharpie or other fine point marker, so they can be read from a distance. They can write as many issues as they would like. They do not have to cover every main heading unless they want to.
   1. You can use some prompts if the group is having difficulty getting started. These should be based on prior focus group or survey results Examples of prompts include:

- Are there injuries at work?

- Does your work cause muscle aches and pains?

- Is there anything that causes stress?

- Are there conditions at work that make it difficult to have a healthy lifestyle (exercise, healthy eating, etc.)?

1. Ask each person to place their issues under the appropriate topic on the sheets of paper.
2. Pass out the list of topics, organized by category from the focus group. Have these written in advance on flip chart sheets by category. They can be covered until you are ready to reveal them, so you don’t waste time posting them during the meeting time.  
   1. If a Post-it covers something brought up in the focus group, you can place it next to that issue on the prepared chart. This will allow them to see visually how closely they intersect. You will then have a more complete list of issues.
   2. Be sure to let them know that you will be summarizing all of this information for their next meeting. If you decide to do Session 2 (see below) in the same meeting, ask the note taker to summarize the list while you move on to Activity 2: The ideal workplace.

*Activity 2: The ideal workplace*

This activity should be done at the completion of the Activity 1 after there is some discussion about issues in the workplace that can impede health, safety, or wellbeing. These issues can include the physical hazards, psychological or social conditions that create stress, personal factors impacting work, and other relevant aspects of workplace policies and environment. The ideal workplace activity is intended to be completed after team members discuss their current issues in the context of major themes found in focus groups or surveys. It allows team members to articulate what an ideal workplace would be like, which can promote creative problem identification and intervention design efforts to help move their workplace toward that ideal state. For example, root causes can be identified for each of the obstacles that are identified, and these root causes can be used in IDEAS Step 1.

Total time: 20-30 minutes

**Overall goals**

1. Team will focus on future possibilities for having a healthier workplace
2. Team will begin a creative process for problem-solving
3. Activity results will provide facilitators with greater knowledge of current concerns and possible directions for the future

**Materials needed**

* Flip chart with self-stick backing   
  Note: This is preferable to a white board since pages can be posted on walls around the room, and participants can follow what has already been stated.
* Large, felt-tipped markers in different colors

**Personnel needed**

This activity is best facilitated by two people; one person facilitates the discussion and the second person helps write down responses.

**Group process**

Ask team members the following questions.

We have been talking about issues that affect your health, safety, and well-being at work. Now we would like you to think about the ideal workplace in terms of these issues.

1. We would like you to think about what an ideal workplace would be like. In your opinion, what are some things that would make a workplace an ideal place to work? Probe:

* Is there anything that could be changed at this workplace that would make your life easier (less stressful, safer, more enjoyable, more healthful)?

1. In your opinion, what would a workplace have to be like to in order for employees to feel or be healthier, be safer in their work, or have a stronger sense of wellbeing?
2. What would it take to get there? (This information can be used in Step 2 of the IDEAS intervention planning process: “Developing objectives and activities for solutions”).

Assuming there are 6-8 participants, this can be an open discussion. If there are more, you may want to form subgroups of 3-4 participants to discuss. Then, have each subgroup report back on their suggestions. As a team member raises an idea, write it down on the flip chart. It is better to capture the main idea than to write down every word.

If there is time, ask team members to label which issue category (from Activity 1) each suggestion falls under. Alternatively, as one facilitator is writing down the suggestions, the second one can be labeling them by category. Team members can then be asked if they agree at the end of the activity.

Ask team if any of the “ideals” they raised might be goals that could be reached, or partially reached, within the next year or two. Make a note that these “ideals” can be used in Step 2 of the IDEAS intervention planning process: “Developing objectives and activities for solutions”).

Proceed to Session 2 (below).

**Session 2**

*Activity: Prioritizing and selecting issues for intervention*

By the end of the session, the group will select 2 or 3 priority issues to focus on for intervention planning.

The issues selected will be the focus of participatory intervention planning, beginning with Step 1 of the Intervention, Design, and Analysis Scorecard (IDEAS) tool. If the group is newly formed, it may be beneficial to select at least 1 issue that might not be too difficult to address quickly and without demanding much in terms of resources.

This activity follows on the results of Session 1. The facilitator should compile issues from focus groups, team discussions, and the possibilities from the ideal workplace categorized by issue. This information should be posted on a chart with issues color-coded, if possible. Each team member should receive a copy of the issues.

**Materials needed**

* Flip chart with self-stick adhesive backing
* Multi-colored markers
* Adhesive round (dot) stickers, 5 per person

**PExHP Process Mapping:** Identify and select issues/concerns

**Personnel needed**

While this can be done by 1 person it is preferable to have second person as backup and to help write down responses.

**Group process**

1. Ask the team to look at the issues from their discussion and the ideal workplace activity that were considered feasible as starting points for this new program. Ask if anything is missing. If so, add it to the list.
2. Ask them to think about the issues that they think are most important.
3. Each team member is given 5 colored dots. Ask them to come up with 2 at a time to place a dot on the issues they think are most important. If they think 1 issue is extremely important, they can place 2 stickers next to it. They are still only allowed 5 stickers in all.
4. Tally the dots and list issues by those with the most dots (i.e., the issue with the most dots is at the top of the list).
5. Ask them to look at remaining issues with no dots. Are any of these important, but were missed by limiting the choice? If there are any, add those to the list. These are the prioritized issues. Take a look at what categories they fall under to see if there is a preponderance of issues related to particular themes.
6. Ask the team to think about the prioritized issues. Ask them to select 2 or 3 issues that should be the focus for intervention or program planning; encourage them to select on that might not be too difficult to address quickly and without demanding much in terms of resources. This can be a group discussion, or you can ask them to decide in groups of 2 and then report back.
7. Congratulate the group on their progress. Ask the group to recommend next steps for communicating the prioritized issues to key managers for feedback and input. If your program has a management Steering Committee, this would be a good time to ask for feedback on the priority topics as they relate to key business concerns. This can help to build support from managers and may uncover new information about the topics.
8. Before proceeding with intervention planning, be sure that the Design Team has been trained on the group process of the IDEAS tool. This can be done by showing the short videos provided on these pages:

Overview of the IDEAS design process

<http://www.uml.edu/Research/Centers/CPH-NEW/Healthy-Work-Participatory-Program/generate-solutions/default.aspx>

See also training videos on each IDEAS Step 1-7.