

HEALTHY WORKPLACE PARTICIPATORY PROGRAM

Facilitator Manual



Acknowledgements

The Healthy Workplace Participatory Program 2.0 Edition (2019) Facilitator Manual and website (www.uml.edu/cphnewtoolkit) were created by the Center for the Promotion of Health in the New England Workplace at the University of Massachusetts Lowell and the University of Connecticut.

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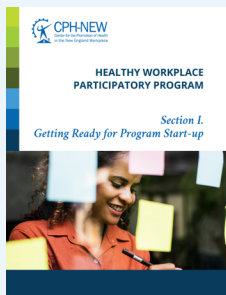
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HOW TO USE EACH SECTION OF THE FACILITATOR MANUAL

This manual provides detailed information useful for implementing the Healthy Workplace Participatory Program (HWPP), a research-based, Total Worker Health program.

The manual contains Sections I, II, and III. Use all three sections to maximize the program benefits for your organization. You can access the materials in this manual plus new or updated materials by visiting the HWPP website: www.uml.edu/cphnewtoolkit

Section I: Getting Ready for Program Start-up

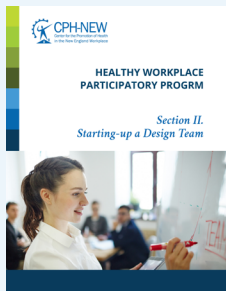


Read Section I thoroughly to learn how to implement the core elements of the program, and customize the program fit to your organization.

Content: About the HWPP and Total Worker Health
Getting Ready for Program Start-up – assessing organizational readiness, gathering management support, identifying health and safety priorities
Forming Programs Teams – Design Team and Steering Committee
Customizing the HWPP to Fit your Organization

Take steps to prepare the organization for program start-up. Use the online resources described in this section to build management support and designate necessary staff resources. Once these are in place, recruit employees to serve on key **program teams**.

Section II: Design Team Start-up



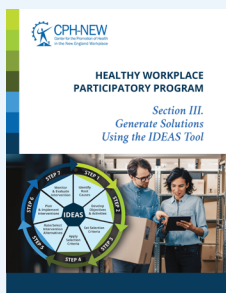
Use the materials in Section II to help you facilitate the initial three meetings of a Design Team.

Content: Facilitator Manual for Design Team Start-up Sessions 1, 2, and 3

- Facilitator Preparation
- Facilitator Agenda
- Design Team Agenda and Handouts

A Design Team is a group of front-line employees who will develop solutions to specific health and safety concerns. The Start-up session materials will help you establish a strong foundation for how your team will work together. They will learn their roles, form agreements, and explore and prioritize topics for interventions.

Section III: Generate Solutions Using the Intervention, Design, and Analysis Scorecard (IDEAS) Tool



Use the materials in Section III to help you facilitate IDEAS Steps 1 through 7. You will craft interventions and develop a business case for each one to improve worker safety and well-being while supporting key organizational goals.

Content: Facilitator Manual for IDEAS Steps 1 to 7

- Facilitator Preparation
- Facilitator Agenda
- Design Team Agenda and Handouts

The intervention design process involves front line employees (Design Team) and organizational leaders (Steering Committee) at specific time points. The process is designed to encourage communication, mutual learning, and a shared commitment to employee safety, health and well-being.

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HEALTHY WORKPLACE PARTICIPATORY PROGRAM

Section II. Starting-up a Design Team



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WHAT YOU WILL FIND IN SECTION II OF THE FACILITATOR MANUAL

Meeting guides for three Design Team Start-up sessions:

- **Start-up Session 1:** Welcome to the Healthy Workplace Participatory Program
 - Your role as a Design Team member
 - Creating team agreements for participation and communication
 - Program goals and expectations – setting the course
- **Start-up Session 2:** Identifying Workplace Safety, Health, and Well-being Issues
 - Focus group activity
 - Ideal Workplace activity
- **Start-up Session 3:** Prioritizing and Selecting Safety, Health and Well-being Issues
 - Voting and rank ordering topics for intervention planning
 - Introduction to the “IDEAS” Tool (Intervention, Design, and Analysis Scorecard)

Each meeting guide contains the following materials:



Facilitator Preparation



Facilitator Agenda *(annotated with group process instructions)*



Design Team Agenda and Meeting Handouts

See Section I for a detailed description of how to use the meeting materials.

Visit the **Design Team Start-up page** to access team recruitment tools and the materials in this guide: <https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/form-design-team/>

Facilitation skills demonstration videos: Links to these videos are in the meeting plans. These videos are specifically tailored to the early stages of Design Team formation. <https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/training-support/facilitation-skills-training-videos.aspx>



Section II.

Starting-up a Design Team

WHAT IS A DESIGN TEAM?

The Design Team consists of non-managerial, front-line employees, and are vitally important to the success of the program. Design Team members can identify health and safety problems employees experience on a day-to-day basis and generate ideas for potential solutions to these problems. Ideally, 6-10 members make up a Design Team.

Design Team members are individuals who are:

- Non-managerial employees
- Interested in health, safety, and well-being
- Able to work successfully in a positive team environment
- Able to represent their peers

Members of the Design Team should be able to commit to regular participation in meetings, plus occasional tasks outside of meetings. Supervisors play an important role in supporting DT member attendance. In a unionized organization, a Design Team could be formed within the union.

Throughout the program, the DT:

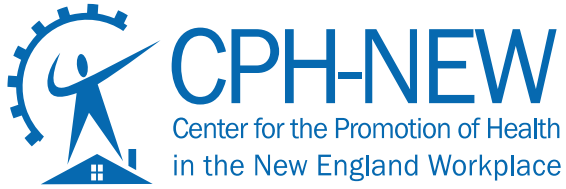
- Meets with the facilitator and selects workplace health and safety issues for interventions
- Designs interventions to address issues appropriate to their work environment
- Develops a business case for interventions to present to the Steering Committee
- Communicates with management and the workforce about health and safety concerns

After implementing a change, the DT:

- Helps promote and evaluate all interventions to protect long term sustainability
- Helps refine interventions as needed

Every Design Team is unique. You may be working with an existing committee within your organization to serve as a Design Team, or you may be working with a brand-new team. Design team members will come with different levels of skills and experience.

No matter the scenario, training is essential for educating and motivating team members to do their best work. The materials in this section will help you do that.



**HEALTHY WORKPLACE
PARTICIPATORY PROGRAM
SECTION II.**

START-UP SESSION 1
Welcome to the HWPP





START-UP SESSION 1

Welcome to the HWPP

F Facilitator Preparation

To do:

- Watch: Videos 1-4 of the Facilitation Skills Training Video Series**
<https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/training-support/facilitation-skills-training-videos.aspx>
- Preview: “What is Total Worker Health?”** University of Iowa Total Worker Health Essentials video series (Decide whether to show the video to the Design Team during the TWH activity.) <https://hwc.public-health.uiowa.edu/for-the-workplace/what-is-total-worker-health/>
- Read about the Role of the Facilitator in Section I of the HWPP Facilitator Manual**
- Optional:** Read about “Ground Rules” in the University of Kansas Community Toolbox, Chapter 16, Section 2 (Developing Facilitation Skills) <https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/Training-Support.aspx>
- Review:** Facilitator Preparation, Facilitator Agenda, and Design Team handouts
- Prepare photocopies** Design Team handouts
- Prepare a draft DT communication plan** to discuss with DT during Activity 4
- Send the DT a friendly reminder of the meeting date and time** at least 2-3 days before the upcoming meeting

To bring:

- Table tents or name tags**
- Flip chart paper and markers**
- Handouts:** Design Team handouts

To know:

Ground Rules are guidelines that the Design Team follows so that all members can participate in the meeting. They set the stage for effective communication and define how the team will operate together.

Team members often feel more invested in following ground rules when the team comes up with the ground rules themselves. If you find that the DT is having difficulty coming up with ground rules, you can suggest some of the following, more common ground rules to get the team talking:

- **Listen and learn from each other**
- **One person speaks at a time**
- **Be on time**

Don't assume that some common ground rules will work for all DTs (especially if you are a facilitator from outside of the organization). For example, health care organizations may require that the ground rules account for late arrivals due to medical emergencies.

Total Worker Health (TWH) is a holistic approach to worker safety, health, and well-being. It acknowledges risk factors related to work that contribute to health problems previously considered unrelated to work. TWH programs focus on making working conditions conducive to health, which can lead to health benefits on and off the job.

See the Total Worker Health handout at the end of this facilitator preparation

Healthy Workplace Participatory Program (HWPP) is a program designed to help employers implement an integrated, Total Worker Health program. Because it's a Total Worker Health program, it focuses on making the working environment supportive of employee health, safety, and well-being.

It's "participatory" because it uses a grassroots approach. Front line employees are in charge of identifying concerns and recommending solutions based on their knowledge of the workplace. The program provides a process and a structure for presenting those solutions in a way that appeals to business leaders.

The program was developed by occupational health psychologists, ergonomists and health promotion researchers at the University of Connecticut and the University of Massachusetts Lowell as part of the activities of the Center for the Promotion of Health in the New England Workplace, a Total Worker Health Center for Excellence.

The program is research-based and has been tested in a variety of occupational settings. You can find journal articles detailing the program development and materials on the HWPP website www.uml.edu/cphnewtoolkit.

Roles of the key participants in the Healthy Workplace Participatory Program

The two-committee structure enables employees from all levels of the organization to be involved in the health, safety, and well-being improvement process. A participatory TWH approach leads to greater employee engagement and leverages employee knowledge and experience. Read about the roles of Design Team, Steering Committee and Facilitator in Section I of the Facilitator Manual.



Fig 1: The HWPP two-committee structure

Post-meeting to do:

1. Type up the team agreements discussed during the meeting and send out to DT members.
2. Take steps to establish the communication systems discussed during the meeting.

What is a Total Worker Health program?

A Total Worker Health program is a new way to promote health on and off the job because it takes a comprehensive, holistic approach to worker safety, health, and well-being. It acknowledges ways that work conditions and work organization (who does the work, how and when) can contribute to health problems previously considered separate from the workplace.



Figure 2 illustrates the overlapping influences of work, community and personal factors on health. A key concept is that work organization can influence each of these areas.

This is why Total Worker Health programs focus on making working conditions conducive to health, which can lead to health benefits on and off the job.

Fig 2. Total Worker Health model of worker well-being.

How is a Total Worker Health program different from what we have now?

Traditional workplace programs for safety and well-being usually are managed separately and do not recognize the interplay between health conditions, behavior, and the work environment.

Traditional Workplace Safety Program:

Aims to reduce exposures to hazards that contribute to work related injury and illness

Traditional Workplace Wellness Program:

Aims to improve personal health behavior, such as exercise, diet, smoking, overweight, etc. that contribute to poor health and chronic diseases.

Examples of an Integrated, Total Worker Health (TWH) Program Approach:

Example: Respiratory illnesses from poor workplace air quality can be more serious for workers who are smokers.

- **A TWH program deals with air quality AND smoking cessation.**

Example: Job stress increases the risk factors for heart disease such as high blood pressure and smoking and low physical activity. Job stress also contributes to anxiety/depression.

- **A TWH program reduces job stressors AND exercise, diet, stress management.**

Example: Physically demanding work can lead to feeling too fatigued to exercise after work or to prepare healthy meals.

- **A TWH program addresses equipment to reduce bodily forces AND work schedules that allow for rest and recovery.**



START-UP SESSION 1

Welcome to the HWPP

F Facilitator Agenda

Meeting Intent:

To launch the Design Team as a cohesive working group.

Desired outcomes:

1. DT members understand the concept and purpose of a Healthy Workplace Participatory Program (HWPP)
2. DT members are clear about the roles and responsibilities of:
 - **The Design Team**
 - **The Steering Committee**
 - **The Facilitator**and how the different groups will communicate with each other
3. DT members create an agreement for how we want to operate as a team in terms of participation and attendance
4. DT members create an agreement for how we want to communicate with each other
5. DT members understand the general sequence and timeline of the HWPP program
6. DT members commit to completing the preparation for the next meeting



Facilitator Agenda

When	What	How
0:00 (5 min)	Arrival	Show up, sign in, find a seat, settle in
0:05 (5 min)	Check-in	<p>1. Facilitator welcomes the group</p> <p><i>Welcome the group warmly, introduce yourself if needed</i></p> <p><i>Suggested talking points:</i></p> <ul style="list-style-type: none"> <i>• Thank you all for committing to this Design Team. Each of you is here based on the knowledge and skills you will bring to the group.</i> <i>• This team has been created to help improve safety, health and well-being of the staff who work here. The leadership of this organization is ready to listen to your ideas for making this place a safer, healthier place to work.</i> <i>• We are going to be spending a lot of time talking and planning. The success of this group will depend on everyone participating.</i> <i>• We need to hear your voice. My job as facilitator is to help set the conditions for you to do that.</i> <p><i>Explain that the DT members will have an opportunity to introduce themselves next</i></p> <p><i>Explain what a round-robin is: we go around the room and each person gets to speak once. We will hold responses from the group until later to stay on time.</i></p> <p><i>The first time the group uses a round-robin process you may suggest that whoever is ready to speak may do so and then can invite the person seated next to them to check-in. Eventually you may move to a round-robin process that allows people to speak in any order they are ready.</i></p> <p>2. Round-robin: My name, my position, why am I here (< 30 sec, each)</p>

When	What	How
<p>0:10 (5 min)</p>	<p>Review Meeting Plan</p>	<p>1. Facilitator explains structure of Meeting Plan</p> <p><i>Suggested talking points:</i></p> <ul style="list-style-type: none"> • <i>These meeting plans are specifically designed to create an environment in which everyone participates</i> • <i>The meeting intent allows DT members to know why they are gathering</i> • <i>The desired outcomes allow DT members to know what specifically will be accomplished by the end of a meeting</i> • <i>The agenda allows DT members to know how the meeting will flow and what to expect at each moment of the meeting</i> <p>2. Review Intent and Desired Outcomes for the meeting</p> <p>3. Facilitator briefly reviews the agenda</p> <p><i>Review the when and what columns only</i></p> <p>Questions and comments after each step</p>
<p>0:15 (20 min)</p>	<p>1. Purpose of HWPP</p> <p>Handout: Well-being and Work</p>	<p>1. Facilitator introduces this next section</p> <p><i>Review the purpose of this section of the meeting agenda and the process steps</i></p> <p><i>Pause to see if anyone has any questions</i></p> <p>2. Each DT member - write down your thoughts to the prompts in the handout about workplace well-being. (2 min)</p> <ol style="list-style-type: none"> a. "What does well-being mean to you?" b. "How does this workplace support your well-being?" c. Are there aspects of well-being that could use more attention here? <p><i>Allowing people to write before speaking allows each person a moment to be thoughtful and collect their thoughts. This technique is especially critical for those who are introverted or need extra time to prepare before speaking</i></p>

When	What	How
		<p>3. Volunteers offer to share <i>Encourage people to share, but be mindful of time</i></p> <p>4. Facilitator presents the concept of a Total Worker Health program <i>You can read directly from the facilitator prep if you wish</i></p> <p>4. (Optional) View "What is Total Worker Health" video from University of Iowa</p> <p>5. Clarifying questions from team <i>Pause to ask the team if they have any questions</i></p>
<p>0:35 (10 min)</p>	<p>2. Roles and Responsibilities</p> <p>Handout: Roles of the DT, SC and Facilitator</p>	<p>1. Facilitator reviews roles of DT, SC, Facilitator <i>See notes in manual</i></p> <p>2. Clarifying questions from team, if needed</p>
<p>0:45 (15 min)</p>	<p>3. Team Agreement: Participation/ Attendance</p>	<p>1. Facilitator explains why we need a team agreement for participation and attendance</p> <p><i>Emphasize why establishing a participation/attendance agreement is critical. See Video for more details</i></p> <p>2. Each person answers the following prompts:</p> <ul style="list-style-type: none"> • <i>What do I expect from myself in terms of participation & attendance?</i> • <i>What do I expect from the team in terms of participation & attendance?</i> <p><i>Write down what each person says.</i></p> <p><i>Initially, make sure each person has space to speak.</i></p> <p><i>If anyone is shy to speak, feel free to skip them and invite them after everyone else has had a turn. Encourage dialogue once everyone has had a turn.</i></p> <p><i>Direct the conversation to address anything that is missing or resolve anything that is contradictory. Continue the conversation until you feel the group is sufficiently "on the same page."</i></p> <p><i>Your agreement should contain language that covers the following topics:</i></p> <ul style="list-style-type: none"> • <i>What behaviors and attitudes are expected on this team, and which are NOT acceptable</i> • <i>What preparation they plan to do</i> • <i>What each team member pledges to do if they miss a meeting or are delayed</i>

When	What	How
<p>1:00 (15 min)</p>	<p>4. Team Agreement: Communication</p>	<p>1. Facilitator explains why we need a team agreement for communication</p> <p><i>Emphasize why a communication agreement is important.</i></p> <p>2. Facilitator guides team to align on the following:</p> <ul style="list-style-type: none"> a. Meeting notices -- how and when b. Meeting location c. Meeting frequency d. Accessing team meeting notes and documents <p><i>Guide team to decide:</i></p> <ul style="list-style-type: none"> 1. <i>How (phone, text, email) and when (e.g. 1 week before meetings) the team should communicate about any meeting tasks</i> 2. <i>Where the team should meet</i> 3. <i>How often can this team meet</i> 4. <i>Where will all the DT meeting documents reside and how will team members access them</i>
<p>1:15 (10 min)</p>	<p>5. HWPP Sequence</p> <p><u>Handout:</u> Sequence of HWPP Activities</p>	<p>1. Facilitator presents the HWPP program sequence</p> <p><i>See handout</i></p> <p>2. Facilitator briefly shows IDEAS wheel</p> <p><i>The IDEAS Tool will be covered in greater detail in Start-up Session 3</i></p> <p>3. Clarifying questions</p> <p><i>Pause to answer questions</i></p>

When	What	How
1:25 (3 min)	6. Next Steps	<p>1. Facilitator reviews preparation for next meeting</p> <p>2. Facilitator asks each person to “opt-in” to preparation</p> <p><i>“Opt-in” - to have each person confirm their agreement to a decision or action.</i></p> <p><i>Go around the table and ask each person whether they agree to complete the preparation for next time. Having each member say this out loud makes it more likely that they will honor the task</i></p> <p>3. Generate/review other next steps, as needed</p>
1:28 (2 min)	Check-out	<p>Round-robin: One word to describe how you are leaving this meeting</p> <p><i>Don't skip this step. A check-out is essential for the participants to feel closure/completion to any meeting</i></p>
1:30	Adjourn	



START-UP SESSION 1

Welcome to the HWPP

DT Design Team Handouts

Handouts:

- **Design Team Agenda**
- **Well-being and Work**
- **Roles of the Design Team (DT), Steering Committee (SC), and Facilitator**
- **Sequence of the HWPP Activities**
- **To Do**



Design Team Agenda

Meeting Intent:

Launch the Design Team as a cohesive working group.

Desired Outcomes:

1. Understand the goals and activities of the Healthy Workplace Participatory Program (HWPP)
2. Be clear about the roles of the Design Team, Steering Committee, and Facilitator
3. Create agreements for participation and communication

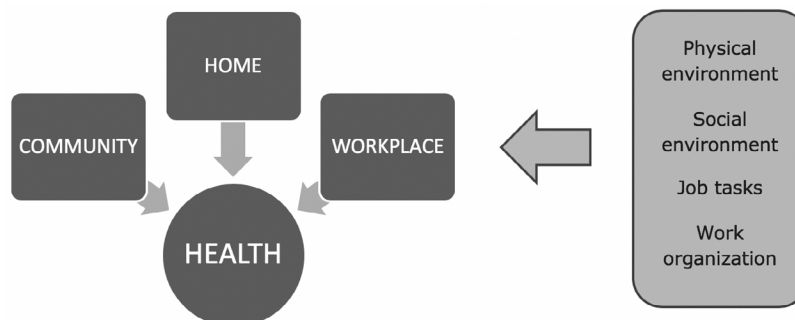
When	What	Discussion Questions
0:00 (5 min)	Check-in	<i>My name, my position, why I am here</i>
0:10 (5 min)	Review the meeting plan	
0:15 (20 min)	1. Purpose of HWPP Handout: Well-being and Work	<i>How do we think about well-being at work? What is this program all about?</i>
0:35 (10 min)	2. Roles and Responsibilities Handout: Roles of the Design Team, Steering Committee and Facilitator	<i>What are the roles of program participants? How will the two committees interact?</i>
0:45 (15 min)	3. Team Agreement: Participation/Attendance	<i>What do I expect from the team in terms of participation & attendance?</i>
1:00 (15 min)	4. Team Agreement: Communication	<i>How can we access materials and communicate with each other between meetings?</i>
1:15 (10 min)	5. HWPP Sequence Handout: Sequence of HWPP Activities	<i>What will we do as a team in the next few meetings?</i>
1:25 (3 min)	6. Next steps	
1:28 (2 min)	Check-out	<i>One word to describe how you are leaving this meeting</i>

Well-being and Work

1. What does well-being mean to you?

2. How does this workplace support your well-being?

3. Are there aspects of well-being that could use more attention here?



Roles of the Design Team (DT), Steering Committee (SC), and Facilitator

DT

Design Team:

- “Front line” employees who produce the work of the organization
- Are knowledgeable about the safety and well-being problems that employees experience on a day-to-day basis
- Develops and proposes ideas for solutions that improve the work process and environment to be more supportive of employee safety, health and well-being.
- Helps with supporting the implementation of new solutions

ST

Steering Committee:

- Administrators, managers, and supervisors
- Have authority to make policy and budget decisions
- Considers and selects interventions (solutions) to support employee safety, health and well-being
- Coordinates resources to implement and evaluate interventions

F

The Facilitator:

- Neutral person who is trusted and can relate well to staff at all levels of the organization
- Coordinates Design Team activities; assures communications between DT and SC

The HWPP two-committee structure:

- **Engages employees at all levels**
- **Leverages the knowledge of front line employees about work and well-being**



Sequence of the HWPP Activities

HEALTHY WORKPLACE PARTICIPATORY PROGRAM

THE OVERALL PROGRAM PROCESS

GETTING READY FOR PROGRAM START-UP

- Organizational readiness assessment
- Gain management support
- Identify and train Steering Committee
- Identify and train Facilitator(s)
- Conduct a needs assessment
- Nominate Design Team members

DESIGN TEAM START-UP

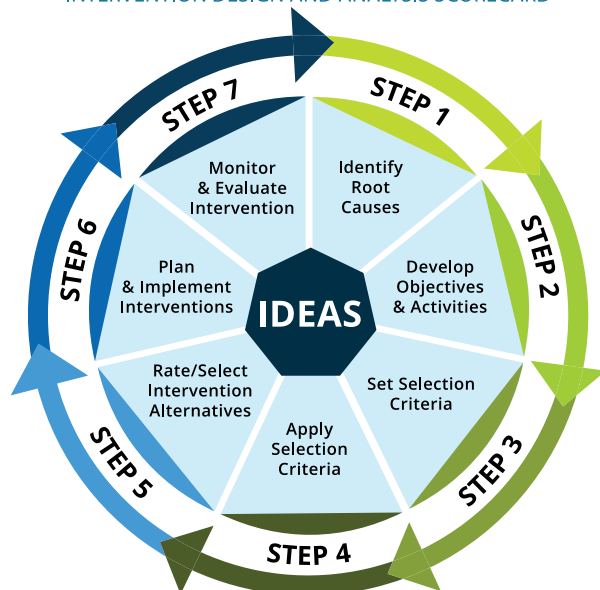
	Session 1	Session 2	Session 3
DESIGN TEAM ROLES	<ul style="list-style-type: none"> - Program orientation - DT/SC roles - Form team agreements 	<ul style="list-style-type: none"> - Focus group - Safety & well-being at work - Envision the ideal workplace 	<ul style="list-style-type: none"> - Select first issue for intervention - IDEAS tool orientation
STEERING COMMITTEE ROLES	<ul style="list-style-type: none"> - Participates in training - Promotes program - Secures release time and meeting space for DT - Assists with troubleshooting - Give feedback on selected topics 		

DESIGN TEAM ROLES

STEERING COMMITTEE ROLES

THE "IDEAS" PROCESS

INTERVENTION DESIGN AND ANALYSIS SCORECARD



What is the IDEAS process?

IDEAS is a 7-step process to develop effective, comprehensive interventions to specific safety or health concerns.

There are roles for Design Team and Steering Committee throughout the process.

A Facilitator guides the process.

The IDEAS tool is used to focus on one safety/well-being issue at a time.

To do for the next meeting:

I will...



Make note of things about the workplace that may influence my health and health-related behaviors

- Include things that both support and detract from health and behaviors



Make note of things at home that may influence how I perform at work

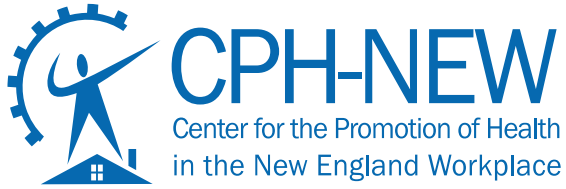
- Include things that both support and detract from how I perform at work



Talk to my coworkers about what they think are the biggest health and safety problems for the organization



Notes:



**HEALTHY WORKPLACE
PARTICIPATORY PROGRAM
SECTION II.**

START-UP SESSION 2
**Identifying Workplace Safety,
Health & Well-being Issues**





START-UP SESSION 2

Identifying Workplace Safety, Health & Well-being Issues

F Facilitator Preparation

To do:

- Watch:** Videos 5-8 of the Facilitation Skills Training Video Series
<https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/training-support/facilitation-skills-training-videos.aspx>
- Review:** Facilitator Preparation, Facilitator Agenda, and DT handouts
- Prepare** (i.e. print, copy) DT handouts
- Work with the Steering Committee** (see “To Know” section below) to prepare a summary of relevant existing data related to employee health, safety and well-being. These data should be provided to the Design Team as they consider issues to prioritize for interventions during Start-up Sessions #2 and #3.
 - Be prepared to distribute the information at the conclusion of Session #2 (*unless you will have time to review it during the meeting after the focus group activity*).
 - Assessment tools may be found on the CPH-NEW website at:
<https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/get-ready/identify-priorities/>
- Send the DT a friendly reminder of the meeting date and time** at least 2-3 days before the meeting.

To bring:

- Name tents** from last meeting and/or name tags
- Flip chart paper and markers**
- Design Team handouts**
- A summary of data/statistics** (*if available*) relevant to employee health, safety and well-being

To know:

Activity 1: Create Ground Rules

- **Purpose:** to set the rules for how the Design Team will behave during meetings to encourage an atmosphere of trust and cohesion. Spelling out the expectations (e.g. respectful communication) gets the group off to a good start and provides a way to correct problems that may arise in the future.
- **Examples of ground rules** are one person speaks at a time, cell phones off, no mocking or attacking someone's idea, etc.
- **Introduce the activity:** *"Ground rules can help our meetings run smoothly and help people feel comfortable participating. Let's take a few minutes to establish the rules of how we want our Design Team to function."*
- **Wrap up the activity:** *"As the facilitator I will do my best to help you stick with these ground rules. Do I have your permission to tell the group when I see us straying from these rules? If you give me permission, then we can have the best chance for good participation and impact."*

Activity 2: Health, safety, and well-being in our organization

(This activity is the centerpiece of the session)

- **Purpose:** DT members to express what they see as the main concerns related to health safety and wellbeing in the organization; they will also identify the primary features of the workplace that support or work against well-being.
- **Introduce the activity:** *"For the next 30 minutes we're going to discuss your perspectives on health, safety, and well-being in this organization. We're going to explore this topic by looking at it in three different ways."*

Refers to flip chart with 3 question prompts:

- *What promotes health, safety and well-being in this workplace?*
- *What might make health, safety and well-being challenging in this workplace?*
- *What have been common safety and health issues in the past here?*

"I'd like you to take 3-5 minutes to think about these questions. You can use the handout for activity 3 to write down your thoughts for the discussion."

Activity 3: Bringing all together

- If the SC has provided data (*see Tips section below*) or other supporting information related to employee injuries and illness, provide that information to the Design Team and ask how they prefer to understand and absorb the material.
 - DT may ask for meeting time to discuss and digest the information, or they may wish to review information individually outside of meeting time.
- **Ask team members,** *"Considering all the topics we discussed, do we have sufficient*

understanding about how our co-workers think about these issues? How might we go about determining this?"

- Tell the DT that in the next meeting, they will review the topics they discussed and what the data say, then they will prioritize the issues they want to work on. Before the next meeting, they can talk to their peers about the topics and they can think about which topics are most important, and which topics may be good to start with as a new Design Team.

Activity 4: The ideal workplace

- **Purpose:** helps the DT think creatively to envision an “ideal state” they would like to see for the organization relative to health, safety and well-being.
- This exercise can help create a positive vision and is meant to be motivational.
- Thinking of what might be achievable in a year or two may give clues for prioritizing issues in the next meeting.
- Encourage creative thinking and remind the team to keep an open mind.
- The agenda has only 15 minutes assigned to this topic. You could lengthen this discussion comfortably by scheduling 2 hours for this meeting instead of 90 minutes.

Facilitation skills and concepts

- **Individual and collective participation are both important**
 - Commit to ensuring that all voices are heard; notice when certain members are quiet.
 - If some dominate and others are quiet, it might help to go around the room and give all a turn. This is called a round robin technique.
- **The team is only as good as the wisdom shared by individual members**
 - Ideas need to be shared and discussed in order to be useful; ideas that are not shared cannot contribute anything positive to the team.
 - Collective wisdom can only come if we listen to each other AND offer our own thoughts AND are willing to learn from each other.
- **People collect and process information differently**
 - Some need to write things down, others do not.
 - DT members who like to reflect and write their thoughts can use the DT handouts for this purpose to assemble their ideas before sharing them. Try to give a minute or two for quiet reflection before beginning a brainstorm. This allows the “thinker/reflectors” to gather their thoughts before they listen to what others have to say.
- **Encourage DT members to ask clarifying questions** when they are confused or don't agree with an idea expressed by another DT member.
 - Clarifying questions help the group members learn from each other, which is important for understanding each other (e.g. “Can you help me understand what you meant when you said X”).
 - DT members can feel discouraged if their ideas are challenged with questions such as, “How can you say that?” Asking for clarification and more information is a much more positive, respectful way to responding to ideas that are confusing or strange. It also can help a DT member more fully develop their thoughts or ideas.
- **Be prepared to help the Design Team keep the discussion moving forward** when they begin to get bogged down in complexity or indecision. You may need to suggest resolving a question outside of the meeting, or setting it aside for future discussion.

Tips for working with a Steering Committee to gather relevant data for the Design Team

- Find out from the Steering Committee (SC) what types of data, if any, are available and relevant for the Design Team on the topic of health, safety, and well-being.
 - **Examples:** summary reports from workers' compensation or health claims, employee job satisfaction surveys, employee health surveys.
- **If data are available**, ask the SC for help with assembling the data and calling attention to the issues/concerns they think are important for the Design Team to address.
 - Engaging the SC in this way reinforces awareness of safety and well-being, and encourages communication about these topics with the Design Team.
 - Providing Design Team members with data provides a learning opportunity as they consider topics to prioritize for interventions during Start-up Session #3.
 - Communication and collaboration on safety and well-being at all levels of the organization is one of the desired outcomes of the HWPP.
- **If no data seem to be available**, it will become important for Steering Committee to plan some type of data gathering activity before proceeding with Start-up Session #3. Data gathering can be formal (e.g. surveys or focus groups) or informal (e.g. conversations, meeting discussions).
 - **If the organization is relatively small**, Design Team members can help gather input from co-workers between Start-up Sessions 2 and 3. A single focus group may work well if the target population is fairly defined.
 - **If the organization is medium size or larger**, it will be more important to use a formal data gathering method to systematically collect views and perspectives from different parts of the organization. Several focus groups can be used.

HWPP Tools for workforce assessment

- Visit the Identify Safety and Health Priorities page for measurement instruments: <https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/get-ready/identify-priorities/>
 - Health and Workplace Focus Group tool
 - All-Employee Work and Health Survey
- Visit the Training and Support page: <https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/training-support/>
 - View a 1-hour pre-recorded training webinar on Identifying Safety and Health Priorities. The video reviews the purpose and approaches to data collection, as well as provides an introduction to data collection tools available on the HWPP website.



START-UP SESSION 2

Identifying Workplace Safety, Health & Well-being Issues

F Facilitator Agenda

Meeting Intent:

Create a shared understanding of how specific aspects of the working environment can affect health, safety, and well-being (HS&W) in this organization.

Desired outcomes:

1. Final agreement on the Design Team Ground Rules (from Session 1)
2. Increased understanding about HS&W in our organization:
 - a. What promotes HS&W in our workplace
 - b. What challenges HS&W in our workplace
 - c. Past HS&W concerns of employees
3. Increased awareness of what available organizational data says about employee health, safety and well-being concerns (Bringing it all together)
4. A shared vision of an ideal workplace that supports health, safety, and well-being



Facilitator Agenda

When	What	How
0:00 (5 min)	Arrival	Show up, sign in, find a seat, settle in
0:05 (4 min)	Check-in	Round-robin: What am I looking forward to in this meeting
0:9 (1 min)	Approve meeting minutes	Facilitator asks Design Team members for any changes and then asks for a vote to approve meeting minutes
0:10 (5 min)	Review Meeting Plan	<ol style="list-style-type: none"> Review Intent and Desired Outcomes for the meeting <i>Ask for a volunteer to read out loud the Intent and Desired Outcomes for this meeting</i> Facilitator briefly reviews the agenda <i>Review only the when & what columns</i> Facilitator ask for a volunteer note-taker <p>Questions and comments after each step</p> <p><i>Pause briefly to see if anyone has a question or comment</i></p>
0:15 (10 min)	1. Finalize the Ground Rules	<ol style="list-style-type: none"> Facilitator presents Ground Rules created in Session 1 <i>Present the cleaned-up version of the ground rules</i> Facilitator asks if anything is missing or needs upgrading Facilitator ask each team member if they are willing to uphold these ground rules <i>Pose the question: "Are you willing to support and uphold these roles?"</i> <i>Go around the group in a round robin to ask for each person's affirmation (or whatever they might need to say)</i> <i>If you get someone who can't quite affirm - ask them what changes need to be made.</i> <i>Continue asking for each person's affirmation</i> <i>Explain that the facilitator's role is to remind the team of the ground rules if needed to help them keep on track.</i>

When	What	How
<p>0:25 (25 min)</p>	<p>2. Health, safety and well-being in our organization</p> <p>Handout: Focus Group: Health, Safety and Well-being at Work</p>	<p>1. Facilitator introduces HS&W activity</p> <p><i>Explain the purpose of this activity. Refer to the discussion questions on a flip chart.</i></p> <p>2. Each person takes time to think and write down answers to the prompts</p> <p><i>Pay attention to whether they need an extra minute or two. Encourage them to write down their thoughts on the handout page</i></p> <ul style="list-style-type: none"> • What promotes health, safety and well-being in this workplace? • What might make health, safety and well-being challenging in this workplace? • What have been common safety and health issues in the past here?" <p>3. Round-Robin: share your answers</p> <p><i>Write down their responses notes on flip charts. Use "+1" if someone gives a similar response to what was already said</i></p>
<p>0:50 (15 min)</p>	<p>3. Bringing it all together</p>	<p>1. Facilitator introduces organizational HS&W data.</p> <ul style="list-style-type: none"> • <i>Introduces the idea that data can be resource to help DT better understand priority concerns</i> • <i>Describes supporting data (if any) provided by SC</i> • <i>Ask DT whether and how they would like to review and better understand the data (e.g. in meeting vs outside of meeting, other)</i> <p>2. Q&A</p> <p>3. Dialogue: <i>Do we have sufficient understanding about how our co-workers think about the issues we discussed today? How might we go about determining this?</i></p> <ul style="list-style-type: none"> • <i>If no organization data exists, spend the entire 15 minutes on this process step</i>

When	What	How
1:05 (20 min)	<p>4. The Ideal Workplace</p> <p>Handout: The Ideal Workplace notes page</p>	<ol style="list-style-type: none"> Facilitator introduces this next exercise <ul style="list-style-type: none"> <i>Introduce the prompt and process</i> <i>Prompt: What would the ideal workplace be like, in regards to health, safety, and well-being? How would it be different from now?</i> <i>Process: Round-robin to get everyone's thoughts out in the open; Dialogue so people understand each other's perspectives.</i> Take 2 minutes to write down your thoughts to the following prompt: <i>What would the ideal workplace be like in regards to health, safety, and well-being?</i> <i>How would it be different from now?</i> Round-robin followed by dialogue <ul style="list-style-type: none"> <i>If no-one begins to speak after the round robin - facilitator can hold silence for a brief moment</i> <i>You can break the silence by making any of the following statements:</i> <ul style="list-style-type: none"> <i>Does anyone have any additional thoughts?</i> <i>Does anyone have a question you'd like to ask someone?</i> <i>[Person's name], can you say more about _X_?</i> <i>Or anything else to get the conversation flowing</i> <i>Take notes on round-robin and dialogue responses on flip chart.</i> <i>When the dialogue begins to slow down or if you are starting to run out time, segue way to the next prompt</i> Round robin: <i>Where should we focus our attention to move toward an ideal workplace?</i> <i>Take notes on round-robin responses on flip chart.</i>
1:25 (3 min)	5. Next Steps	<ol style="list-style-type: none"> Facilitator reviews preparation for next meeting Facilitator describes goals for next meeting Clarifying questions, if needed
1:28 (2 min)	Check-out	Round-robin: One word to describe how you are leaving this meeting
1:30	Adjourn	



START-UP SESSION 2

Identifying Workplace Safety, Health & Well-being Issues



Design Team Handouts

Handouts:

- **Design Team Agenda**
- **Focus Group: Health, Safety and Well-being and Work**
- **The Ideal Workplace**
- **To Do**



Design Team Agenda

Meeting Intent:

Create a shared understanding of how specific aspects of the working environment can affect health, safety, and well-being (HS&W) in this organization.

Desired Outcomes:

1. Final agreement on Ground Rules
2. Awareness of how HS&W issues are viewed by all team members.
3. Increased awareness of what available data tell us about HS&W
4. Shared vision of an ideal workplace supporting HS&W

When	What	Discussion Question
0:05 (9 min)	Arrival/Check-in	<i>What am I looking forward to in this meeting?</i>
0:09 (1 min)	Approve meeting minutes	
0:10 (5 min)	Review Meeting Plan	
0:15 (10 min)	1. Finalize the Ground Rules	<i>Are there any changes needed? Are you willing to support and uphold these rules?</i>
0:25 (25 min)	2. Health, safety and well-being in our organization Handout: Focus Group: Health, Safety and Well-being at Work	<i>What promotes health, safety and well-being in this workplace? What might make health, safety and well-being challenging in this workplace? What have been common safety and health issues in the past here?</i>
0:50 (15 min)	3. Bringing it all together	<i>Do we understand how our co-workers think about the issues we discussed today? How might we find out?</i>
1:05 (20 min)	4. The Ideal workplace Handout: The Ideal Workplace	<i>What would the ideal workplace be like in regards to health, safety, and well-being? How would it be different from now? Where should we focus our attention to move toward an ideal workplace?</i>
1:25 (3 min)	5. Next Steps	
1:28 (2 min)	Check-out	<i>One word to describe how you are leaving this meeting?</i>

Focus Group: Health, Safety and Well-being and Work

What promotes health, safety, and well-being in this workplace?	What challenges health, safety, and well-being in this workplace?	Past health, safety, and well-being concerns in my workplace



The Ideal Workplace

Notes:

What would the ideal workplace be like regarding health, safety, and well-being?

How would it be different from now?

To do for the next meeting:

I will...

-  **Review the organizational information provided (if any) to better understand what employees view as the most pressing health, safety, and well-being concerns**

And/Or

-  **Speak to at least three employees about what they believe to be the most pressing health, safety, and well-being concerns and record their thoughts below**

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Notes:

**HEALTHY WORKPLACE
PARTICIPATORY PROGRAM
SECTION II.**

START-UP SESSION 3
**Prioritize and Select
Concerns for Intervention**





START-UP SESSION 3

Prioritize and Select Concerns for Intervention

F Facilitator Preparation

To do:

- Watch:** Video 8 of the Facilitation Skills Training Video Series
 - <https://www.uml.edu/Research/CPH-NEW/Healthy-Work-Participatory-Program/training-support/facilitation-skills-training-videos.aspx>
- Review:** Facilitator Preparation, Facilitator Agenda, and DT Handouts
 - Ensure that you understand the process of the group voting activity (*explained below*)
- Prepare** (*i.e. print, copy*) DT handouts
- Send the DT a friendly reminder of the meeting date and time** at least 2-3 days before the upcoming meeting

To bring:

- Blank flip chart paper and markers**
- Flip charts from the prior meeting** (what promotes/detracts from well-being at work)
- Multiple stacks of post-it notes**
- “Dot” stickers** (*enough for 3 for each person*); If you cannot obtain “dot” stickers, make sure you have multiple wide tip markers to use instead
- Design Team handouts**

To know:

Activity 1:

Report back on peer input on Health, Safety and Well-being issues

- **Purpose:** to provide an opportunity for DT members to share and discuss any new topic areas (*from discussions with co-workers or from data they reviewed*) before they begin to prioritize and select their first issue for intervention planning.
- **Having flip charts from the prior meeting may be useful to remind DT members of topics discussed.** Add to this list based on new information and/or new inputs from co-workers.
- **Giving DT members an opportunity to digest new information is important for learning how other people view the issues.** This may be a first experience for some DT members to use data in decision-making.
- **DT members may wish to hear from a subject expert to help them interpret data and/or to learn about a topic in depth.** If the DT is enthusiastic and wants to learn more, consider planning time for an expert to attend a meeting for this purpose.
- **This will not be the last opportunity for the DT to gather and review data.** Tell DT members that they can request more information later about the specific issue area they'll be working on.

Activity 2:

Prioritizing Health, Safety and Well-being concerns

- **Purpose:** help the DT organize and narrow down the topics they may work on.
- **Introduce activity:** *"In the next 20 minutes we're going to develop a list of issues you'd like to see this team prioritize for developing interventions. Each of you will suggest the top three issues you think we should address. Then we'll organize them into themes if some topics are related to each other."*

Thematic/topic grouping

- **During the individual brainstorming of HS&W concerns themes will arise.** These can be grouped into similar topics. However, if the DT disagrees on groups, do not force concerns to fit into a broader group.
- This process allows DT members to observe how many people think a particular issue is important, or which smaller issues contribute to a larger issue.
- For time management purposes, it will be important to encourage DT members to keep the discussion at a high level and not go into great detail.

Activity 3.

Selecting the first Health, Safety or Well-being issue for intervention

- **Introduce the activity:** “We’ll vote to decide which issue you want to focus on first to develop interventions. We’ll do this in several rounds. In the first round - Each DT member gets 3 votes. Cast your votes however you wish - 1-3 votes per issue. We will then do a gradual process of elimination to get to the top issues.”
- **After the group votes once, eliminate the bottom of the field.** If more votes are needed, continue to remove the bottom of the field with each successive round until you get to a list of three issues that the group designates are most important.

Dialogue to choose first issue to tackle (final vote and winnowing)

- To get the team to the point of choosing the first concern to address, you will facilitate the team in a second (and final) round of voting to decide which concern to address first.
- **As an introduction to the vote you will want to make the following points to group**
 - This is only the first concern and the team will be addressing others as it continues its work
 - The first concern should be one that the team believes can be tackled successfully.
 - By tackling an “easier” task first, it will help the DT master the intervention design process
 - This will also allow the DT to build their skills in working with the Steering Committee
- Allow each DT member ONE VOTE.
- If there isn’t a clear choice, guide the group in a short dialogue to try to nudge the group towards unity.
- Use an “opt-in” question to confirm that all team members are willing to commit to moving forward.



START-UP SESSION 3

Prioritize and Select Concerns for Intervention

F Facilitator Agenda

Meeting Intent:

The intent of this meeting is to decide which Health, Safety, and Well-being (HS&W) topics are most important for the Design Team to focus on. The topics will be prioritized for developing interventions one topic at a time.

Desired Outcomes:

1. A shared understanding of any new HS&W information since we last met
2. A list of high priority HS&W concerns
3. The first HS&W concern the DT will address using the IDEAS toolkit
4. Clear next steps



Facilitator Agenda

When	What	How
0:00 (4 min)	Arrival/ Check-in	<p>Show up, find a seat, settle in</p> <p>Round-robin: If you could be a bumper sticker, what would you be? (10 sec each)</p> <ul style="list-style-type: none"> • <i>Or any other question you wish to help kick-off the meeting</i> • <i>Should be a question that can be addressed with a short answer</i>
0:04 (1 min)	Approve Meeting Minutes	Facilitator asks Design Team members for any changes and then asks for a vote to approve meeting minutes
0:05 (5 min)	Review Meeting Plan	<ol style="list-style-type: none"> 1. A volunteer reviews the intent and desired outcomes for the meeting 2. Facilitator briefly reviews the agenda <p>Questions and comments after each step</p>
0:10 (10 min)	1. Report back - peer input on HS&W issues	<ol style="list-style-type: none"> 1. Facilitator reviews where we've been and where we are going <ul style="list-style-type: none"> • <i>Recap of DT tasks since last meeting, to:</i> <ul style="list-style-type: none"> • <i>Review any data summary or survey reports (if available)</i> • <i>Talk with co-workers to gain better understanding of these issues</i> 2. Round Robin: What did you do? Who did you talk to? What did you learn since our last meeting? (1 min each)
0:20 (15 min)	2. Prioritizing health, safety and well-being concerns Handout: Prioritizing health, safety and well-being concerns	<ol style="list-style-type: none"> 1. Facilitator introduces the purpose of the prioritizing exercise <ul style="list-style-type: none"> • <i>The team will organize and prioritize the topics that matter most to them.</i> • <i>They will vote to select the first topic to address and will develop interventions for this topic.</i> • <i>They will return to the list for future rounds of intervention planning</i>

When	What	How
		<ol style="list-style-type: none"> 2. Each DT member writes down three or four HS&W concerns that are the most significant for the organization to address. One topic per sticky note (~5min) <ul style="list-style-type: none"> • <i>Significant can be: urgent, impactful, or “lowest hanging fruit”.</i> • <i>Write down one concern per sticky note</i> • <i>Use less time if people seem ready to move on</i> 3. Each DT member post their notes <ul style="list-style-type: none"> • <i>Invite each person to read off their stickies and post them at the front of the room or where everyone can see it.</i> • <i>Encourage the team to sort the stickies into groups or themes.</i> • <i>Create theme headings as needed</i> • <i>Note when one issue is linked with another issue</i> 4. Dialogue: Are there any key HS&W concerns missing from these groups? (5 min.) <ul style="list-style-type: none"> • <i>Make any adjustments needed</i>
<p>0:35 (20 min)</p>	<p>3. Selecting the first HS&W concern</p>	<ol style="list-style-type: none"> 1. Facilitator introduces group voting activity <ul style="list-style-type: none"> • <i>We’ll vote to decide which issue you want to focus on first to develop interventions</i> • <i>We’ll do this in several rounds</i> • <i>The first round - Each DT member gets 3 votes</i> • <i>Cast your votes however you wish - 1-3 votes per issue</i> • <i>We will then do a gradual process of elimination to get to the top issues</i> 2. Each member votes 3. Facilitator guides group to reduce the field <ul style="list-style-type: none"> • <i>Round 1: Suggest eliminating the bottom half</i> • <i>Round 2 & 3 - keep reducing by half until you get to 3 remaining (or whatever makes sense)</i> 4. Dialogue: Which issue do we want to tackle <u>first</u> <ul style="list-style-type: none"> • <i>You may use the guiding prompt: What concern if resolved could be most doable and impactful for the team to tackle first</i> • <i>Since we are a new team - we could choose something that could be an “easy win”</i> • <i>Try to bring group to consensus by emphasizing that this concern will be the first of many</i>

When	What	How
		<p>5. Facilitator asks for final approval</p> <ul style="list-style-type: none"> • <i>Ask group to “opt-in” to this choice by raising their hands</i> • <i>Can also ask: How do I rate my enthusiasm for starting with this issue. (5 = off the charts; 4 = very enthusiastic; 3 - good; 2 = okay; 1 = do not support this choice)</i>
<p>0:55 (3 min)</p>	<p>4. Clarity on next steps</p>	<ol style="list-style-type: none"> <i>1. Facilitator reviews preparation for next meeting</i> <i>2. Generate/review other next steps as needed</i>
<p>0:58 (2 min)</p>	<p>Check-out</p>	<p>Round-robin: <i>A few words to describe how I feel as I leave this meeting</i></p>
<p>1:00</p>	<p>Adjourn</p>	

START-UP SESSION 3



Prioritize and Select Concerns for Intervention

DT Design Team Handouts

Handouts:

- Design Team Agenda
- Prioritizing Issues: Health, Safety and Well-being and Work
- To Do and notes page



Design Team Agenda

Meeting Intent:

The intent of this meeting is to decide which topics are most important for the Design Team to focus on. The topics will be prioritized for developing interventions one topic at a time.

Desired Outcomes:

1. Everyone understands any new HS&W issues since last the meeting.
2. A list of high priority HS&W concerns for DT to address over time.
3. Decision on the first HS&W concern the DT will address.

When	What	Discussion Questions
0:00 (4 min)	Arrival/Check-in	<i>If you were a bumper sticker, what would you say?</i>
0:04 (1 min)	Approve meeting minutes	
0:05 (5 min)	Review meeting plan	
0:10 (10 min)	1. Report back – peer input on HS&W issues	<i>Who did you talk to?</i> <i>What did you learn since our last meeting?</i>
0:20 (15 min)	2. Prioritizing health, safety and well-being concerns Handout	<i>What are the 3-4 most important issues the organization needs to address?</i> Each member contributes ideas, then the team organizes the ideas and begins to prioritize
0:35 (20 min)	3. Selecting the first HS&W concern	<i>Which concern do we want to tackle first?</i> Members vote
0:55 (3 min)	4. Next steps	
0:58 (2 min)	5. Check-out	<i>A few words to describe how I feel as I leave this meeting</i>

Prioritizing Issues: Health, Safety and Well-being and Work

Write down the top 3-4 health & safety issues that you think are most important for the organization to address. Write ONE concern on each post-it note.



Top 3 selected priorities of the DT:

1.

2.




3.

Additional data that needs to be collected?

(e.g. employee surveys, compensation claims, etc.)

To do for the next meeting:

I will...

-  Gather any additional data that I agreed to collect that will enhance the Design Team's understanding of the prioritized health and safety concerns
-  Identify which key managers/stakeholders could provide additional data on the HS&W concern that was selected
-  Think about things that may be contributing to the prioritized health and safety concerns

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Notes:
