

*A research intervention and information center for
improving the health of New England employees*

Dear Program Facilitator,

This packet provides information about how to involve non-managerial employees in planning health and safety interventions through use of the Intervention, Design and Analysis Scorecard (IDEAS) tool. These materials may be used as a supplement to your existing health, safety, and wellness program activities.

What is the purpose of the IDEAS tool?

The IDEAS tool was developed by university researchers and field-tested by employers in a variety of industrial settings. The tool was designed to achieve four objectives:

1. Identify root causes and barriers to health and safety in the workplace
2. Produce innovative workplace interventions for consideration by company managers
3. Engage front-line employees to achieve “buy-in” and ownership of interventions
4. Organize health and safety communication between management and the workforce

What is the IDEAS tool?

The IDEAS tool provides detailed guides and worksheets for you to lead a 7-step “systems analysis” process for designing solutions to health or safety concerns in the workplace. Using these 7 steps, front-line employees can identify the causes behind workplace health concerns, and craft grassroots solutions that directly address those causes.

How and when is the IDEAS tool used?

The IDEAS tool is intended to be used as a step-by-step planning aid once priorities for health or safety interventions have been identified. The tool is most effective when a group of front-line employees can meet regularly to accomplish the steps.

Depending on the size of your organization and the makeup of your Healthy Workplace program committee, there are several ways to use the IDEAS tool. Flow charts are available to show how the process can work with alternative program structures.

You as the facilitator are responsible for organizing meetings, guiding the group through each step, and capturing their progress on the IDEAS worksheets. A step-by-step description of the process is outlined on the next page. See the IDEAS Overview sheet for more detail. The process requires ample meeting time, either concentrated for a short duration, or spread out over several weeks. By the end of this process, the group will have developed viable interventions that address a key health or safety goal of your organization.

Training videos, quick reference guides, examples, and a detailed IDEAS facilitator guide can be downloaded from the website at the University of Massachusetts Lowell for the Center for Promotion of Health in the New England Workplace (www.uml.edu/cphnewtoolkit).

The Intervention, Design, and Analysis Scorecard (IDEAS): A Tool for Planning Interventions to Improve Employee Health and Safety

Overview and Organization

The IDEAS tool is a structured 7-step process for planning high impact and cost-effective workplace interventions. The IDEAS tool is used in a healthy worksite program to design, select, and implement interventions aimed at improving workplace health and safety.

IDEAS offers three key elements needed to establish a sustainable program for continuous improvement of employee health and safety:

1. Engagement of employees at all levels in intervention planning and design efforts,
2. Improved communication between line-level employees and upper-management regarding health and safety issues and concerns, and
3. Integrated intervention approaches that involve the combination of changes to the workplace and the way work is organized as well as lifestyle and behavior changes by employees.

The tool is designed to be easy to use in a step-by-step fashion. A planning worksheet is provided for each of the 7 steps along with a quick reference guide that explains the key activities involved in that step. The information and ideas captured in the first worksheets are used in later steps when decisions about which interventions to support are made by the healthy worksite committee and/or upper management.

The IDEAS tool group process

IDEAS Step 1: The IDEAS tool is introduced as a “roadmap” to a healthier workplace. After priorities have been set for health, safety, and wellness, a Healthy Worksite program committee identifies one pressing health concern in the workplace and then brainstorms the root causes of the problem.

IDEAS Step 2: The group sets a measurable health objective for the selected health concern, and then brainstorms solutions or activities that will help meet that objective.

IDEAS Step 3: The group sets minimum criteria that solutions have to meet in order to be considered viable. For example, how many employees should an intervention benefit? What benefits are expected?

IDEAS Step 4: The group applies the selection criteria developed in IDEAS Step 3 to each activity identified in IDEAS Step 2. Then they come up with 3 intervention alternatives using these activities. (The rationale for 3 interventions is that it provides flexibility later on when choices must be made about which, if any, intervention is implemented.)

IDEAS Step 5A: The group rates each intervention in accordance with the IDEAS worksheet labeled “Step 5A.” If working with a front line committee until this point, you will submit the suggested interventions to the Healthy Worksite management committee or other organizational decision makers. Going forward, you will work with organizational decision makers to complete the remaining steps in the IDEAS tool.

IDEAS Step 5B: The Healthy Worksite Committee or other key decision makers review the intervention ideas and then select the most appropriate one(s) for implementation.

IDEAS Step 6 (can also be merged with IDEAS Step 5B): The Healthy Worksite Committee and other key stakeholders consider how to implement the selected interventions. Resources are allocated and deadlines set. Management plans how to track intervention effectiveness. Deadlines for monitoring intervention effectiveness are set.

Ideas Step 7 (flexible format – can be a joint meeting, several meetings, or email): The program facilitator and representatives of managerial and front-line employees meet and review the effectiveness of the intervention. The intervention is adjusted as needed.

Worksheet Terminology and Customization

IDEAS worksheets have been written in plain language to be as useful as possible across a wide range of workplaces. However, if some of the terms used on the worksheets are unclear or are poor choices in a particular workplace, these can be re-worded as needed to be more acceptable or useful to the organization.

Engaging Front-line Employees in Planning and Design Efforts

While front-line employees can play an important role on any Healthy Worksite Committee, small groups of front-line employees are often more effective in prioritizing health and safety concerns and in developing interventions ideas. Ideally, an employee “Design Team” of 5-7 members is formed and meets regularly with a program manager or facilitator to develop intervention ideas that can be proposed to the Healthy Worksite Committee. However if this is not feasible, program managers can also conduct focus groups with front line employees to provide them with some opportunities to discuss health and safety issues and to offer ideas for interventions. The IDEAS flow chart indicates which planning steps can benefit most from engaging front-line employees in focus groups. Research has shown that a high level of employee participation early in the intervention planning process not only yields more targeted and effective interventions, it also builds a sense of ownership about interventions that is needed for a successful and sustainable healthy worksite program.

What if you need further help with the IDEAS tool?

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