

Coachella Valley Economic Partnership (CVEP) Workplace Wellness Pilot Study



Conducted by



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EXECUTIVE SUMMARY

In December 2013, HARC, Inc. received a grant from the California Wellness Foundation to conduct a pilot project to provide evidence-based workplace wellness services for organizations in the Coachella Valley.

HARC partnered with the Coachella Valley Economic Partnership (CVEP) to conduct these services. HARC agreed to provide CVEP with a comprehensive suite of services, including assessing workplace wellness needs, designing and implementing interventions to address those needs, and evaluating the efficacy of the intervention. This report documents the entire suite of services provided to CVEP.

Needs Assessment

To establish organizational outcomes of interest, HARC conducted logic modeling sessions with upper management at CVEP in February 2014.

The results of the logic modeling session produced two main goals that the upper management wished to accomplish with this workplace wellness intervention:

1. Develop clear, concise, measurable organizational goals and communicate these to all employees.
2. Communicate employee job descriptions and individual skills throughout the organization.

Next, to establish employee needs, HARC conducted an online survey in June 2014. The results of the employee survey produced a number of findings identifying strengths and needs in the CVEP workplace.

Physical Work Environment

In regards to physical aspects of work, CVEP is a very safe workplace; very few employees have been injured, none have been seriously injured, and the majority are comfortable at work. There are some ergonomic issues associated with a primarily sedentary, computer-based work-force. To address the physical issues, HARC recommended an ergonomic assessment of all CVEP employees' workspaces.

Psychosocial Work Environment

In regards to psychosocial aspects of work, workload is a major source of stress: many employees feel that they have an extremely heavy workload. Job control, job clarity, and work-life balance are all strong at CVEP; employees have the control and flexibility they need to be successful both at work and outside of work. However, team relations are somewhat strained between the two offices, and while immediate supervisors are considered very supportive, there is a divide between upper management and lower-level employees. Additionally, considerable stress stems from a lack of consistent, fair application of policies across the workforce, as well as a lack of accountability.

To address the psychosocial issues, HARC recommended:

1. Engage in a team-building workshop that will help bring the two offices together and increase team cohesion throughout the organization. A few potential vendors are suggested; one may be a particularly good fit as they offer not only team building but also time management skills, which may also help with the feelings of being overworked.
2. Adopt programs and policies that will help employees cope with stress in healthy ways, such as “Bring Your Dog to Work” day, work from home days, relaxation classes, or health programming.
3. Senior management staff attend a workshop to hone management skills.

Work-Related Resources

In regards to work-related resources, employees are generally satisfied with their pay, benefits, and paid time off. However, satisfaction with professional development opportunities is low, and several employees noted that even when professional development opportunities are offered, the workload is too heavy to take those opportunities.

To address the work-related resources issues, HARC recommended:

1. Conduct a brief survey of employees to identify specific professional development opportunities that would be welcomed. Use the results from this survey to plan several professional development opportunities and trainings.
2. Adopt a policy that all employees must participate in at least one employer-sponsored professional development activity per fiscal year. Be sure to communicate the importance of this policy to all managers, as it cannot become the organization’s culture without complete buy-in.

Interventions

In light of the recommendations listed above, CVEP chose to conduct the following interventions, with support from HARC:

- Ergonomic assessments:
 - Timeframe: August and September 2014
 - Participants: Eight employees, representing both offices, opted into this intervention
 - Facilitator: New Beginning Physical Therapy
 - Result: Gina Malloy, physical therapist, made recommendations for changes to be made to individual workstations.
- Half-day off-site seminar:
 - Timeframe: August 2014
 - Participants: Employee Leadership Council (six members of upper management)
 - Facilitator: Claudell Greear-Maggio, Human Resources Professional Consultant
 - Result:
 - CVEP Employee Leadership Council was introduced to the “Five Dysfunctions of a Team” training.
 - Employee Leadership Council identified a lack of face-to-face communication between the two offices as a critical barrier to the success of CVEP, and set a 30-day goal to job shadow other managers.

- Intra-office job shadowing:
 - Timeframe: September 2014
 - Participants: Employee Leadership Council
 - Facilitator: Not applicable
 - Result: 100% compliance in job-shadowing, all impressed by what the other team members bring to the table.
- Retreat:
 - Timeframe: September 29th and 30th, 2014
 - Participants: Employee Leadership Council
 - Facilitator: Claudell Greear-Maggio
 - Result:
 - Set a thematic goal: “We will design and implement an efficient financial and human resource infrastructure that ensures our organizational excellence by June 1, 2015.”
 - Established 10-month objectives:
 - Compliance with all funding sources
 - Standardize expense reports
 - Respond to the findings of the HR assessment
 - Meet with Project Directors to identify their needs
 - Have the Executive Committee approve a policy for timely employee reviews that are consistent
 - Scheduled monthly meetings through June 1, 2015, and 2 additional meetings prior to the upcoming all-staff meeting to ensure they were prepared to deliver a consistent message to staff.
- Human Resource Assessment
 - Timeframe: Final assessment given to CVEP on October 6, 2014
 - Participants: Not applicable – Ms. Greear-Maggio reviewed current administrative practices utilized by CVEP.
 - Facilitator: Ms. Greear-Maggio
 - Result: Ms. Greear-Maggio recommended further action, including:
 - CVEP should develop job descriptions that clearly define essential functions and chain of command. Subsequently revisit the organizational chart to revise.
 - CVEP has a lack of training for managers on key employment issues.
 - CVEP has some procedure deficits and opportunities for improving administrative processes.
- All-Staff Meeting
 - Timeframe: October 16, 2014
 - Participants: All staff
 - Facilitator: Employee Leadership Committee
 - Result:
 - Community agreements
 - Sharing of ergonomic lessons learned
 - Team building exercises

Program Evaluation

A survey was conducted in December 2014 to assess the impact of these interventions. Results showed that overall, the workplace wellness program had a positive impact. Outcomes improved in several areas, most notably general health and psychosocial work environment.

Physical Work Environment

There were no substantial improvements made in terms of physical work environment. Several employees did get an ergonomic assessment as a part of the intervention, and were able to fix some minor issues in their workspaces. However, to implement all suggestions made during the ergonomic assessment, these employees need CVEP to purchase new equipment. Until this new equipment is purchased, ergonomics and general comfort at work is unlikely to improve.

Psychosocial Work Environment

Participants reported a slight reduction in work overload over the course of the workplace wellness project, and all participants now feel that they have at least some of the tools they need to do their job. Levels of job clarity and job control improved from Time 1 to Time 2. Most notably, the quality of relationships with immediate coworkers and the broader staff both improved over the course of the workplace wellness program.

Feedback from participants indicated that the psychosocial interventions were enjoyable and productive. These interventions resulted in improvements in communication, greater respect and understanding, and a more cohesive team. There are some concerns that these positive changes will not be long-lasting. To ensure this does not happen, CVEP must continue to build upon the activities that have been conducted as a part of the workplace wellness program, and sustain these activities.

Additionally, there remain some significant concerns about the divide between the two offices—both in terms of geography and in terms of philosophy. This is an issue that should be addressed at the Board level, as it will likely require major changes to address.

Work-Related Resources

There was very little change in perceptions of the quality of work-related resources such as pay, benefits, and paid time off. This is likely due to the fact that CVEP chose to focus on the physical and psychosocial work environment interventions.

Conclusion

From CVEP's perspective, the workplace wellness project was beneficial; team cohesion, communication, job clarity, job control, and general health all improved. To sustain these positive changes, CVEP must continue to put effort into team-building, professional development, and human resource management.

From HARC's perspective, the workplace wellness pilot was a success. HARC was able to complete all of the services as specified. There were some challenges, and HARC learned several lessons that will be useful in future iterations of the workplace wellness program. HARC is exploring new partnerships and funders for future workplace wellness services.

INTRODUCTION

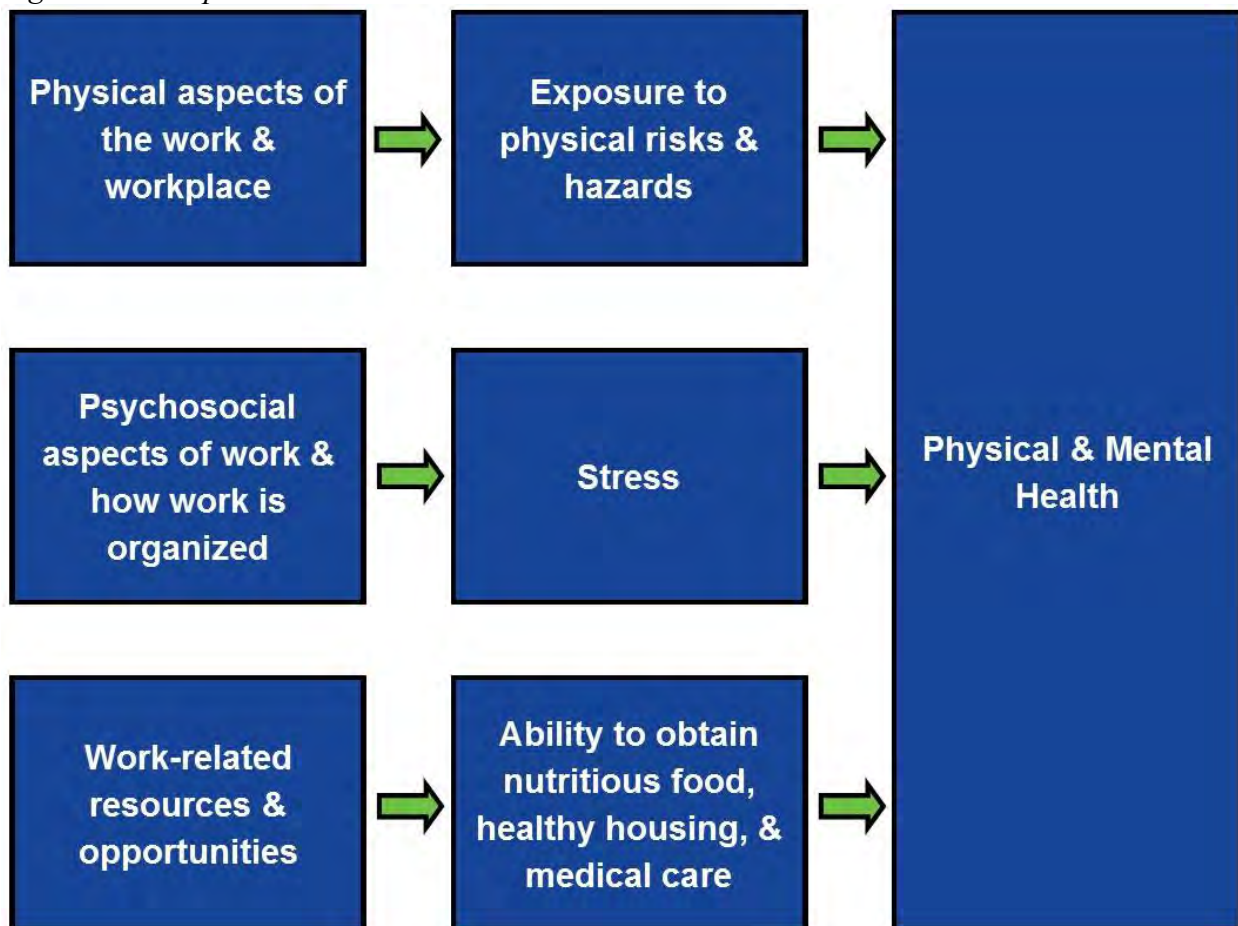
Health

Health is made up of both physical and psychological attributes. Positive health consists not only of a lack of negative conditions and diseases, but also a presence of positive states and conditions such as energy and satisfaction.

Promoting and protecting employee health is in the best interests of the organizations that employ them. Healthy workers are better for the organization—they have higher productivity, lower absenteeism, and lower worker’s compensation claims, to name a few desirable outcomes (Goetzel, Guindon, Turshen, & Ozminkowski, 2001). Organizations with healthy employees can be much more successful than organizations with sick, exhausted, or absent employees.

The work environment contributes to employee health and wellness in three primary ways, as illustrated in Figure 1 (Robert Wood Johnson Foundation, 2011).

Figure 1. Workplace Wellness Model



Source: Robert Wood Johnson Foundation Issue Brief #9, Exploring the Social Determinants of Health, May 2011.

HARC and CVEP Partnership

HARC, Inc. is a nonprofit located in the Coachella Valley of California that specializes in research and evaluation in the field of health and wellness. In order to expand to a new area of health and wellness services, HARC designed a workplace wellness suite of services designed to help local organizations maximize employee health, thereby benefitting both individual and organizational outcomes.

In order to obtain the necessary work samples to demonstrate the utility of this set of services, HARC needed an organization to serve as a pilot project. In December 2013, HARC received a grant from the California Wellness Foundation to conduct such a pilot project.

HARC partnered with the Coachella Valley Economic Partnership (CVEP) to conduct these services. HARC agreed to provide CVEP with a comprehensive suite of services, including assessing workplace wellness needs, designing and implementing interventions to address those needs, and evaluating the efficacy of the intervention.

NEEDS ASSESSMENT

In order to assess what CVEP employees needed to make their work environment a healthy, happy, and productive one, HARC began the project by conducting a needs assessment. The needs assessment consisted of two parts: logic modeling and a survey of all staff.

Logic Modeling Method

Dr. LeComte-Hinely, the Director of Research and Evaluation at HARC, facilitated a logic modeling session with members of CVEP's management team on February 20, 2014. This logic modeling session was designed to identify what the upper management team hoped to accomplish from the workplace wellness project.

Together the team identified indicators of success at CVEP, barriers to success, and, from these, specific goals that would help CVEP to be more successful and overcome barriers. This meeting eventually identified strategies for reaching those goals, and a single logic model was created and approved by management.

Employee Survey Method

While the logic model identified what the upper management identified as problem areas, it is important to also assess what the entire team identifies as problem areas. As such, an employee needs assessment survey was created to identify areas of workplace health that require improvement. HARC staff created the content of the survey based on the Robert Wood Johnson model of workplace wellness (see Figure 1), and CVEP management was given an opportunity to review and revise the survey. The survey was hosted online through the service SurveyMonkey.

The initial survey invite was sent out as a group email to 29 people on Thursday, June 5, 2014 around 10:00 am. A reminder was sent to all employees who had not yet participated on Monday, June 9, 2014, around 9 am. A personalized final reminder was sent to non-participating employees on Thursday, June 12, 2014. The survey was closed on Monday, June 16, 2014.

Logic Modeling Results

The logic modeling process identified the following two goals:

1. Develop clear, concise, measurable organizational goals and communicate these to all employees.
 - a. Purpose: To enhance employees' understanding of how their individual role aligns with CVEP's overall purpose.
 - b. Strategies to achieve the goal:
 - i. Identify clear, concise, measurable organizational goals for CVEP.
 - ii. Explicitly identify how each employee's job contributes to one or more of the organizational goals.
 - iii. Communicate CVEP goals to all employees.
2. Communicate employee job descriptions and individual skills throughout the organization.
 - a. Purpose: To eliminate redundancies, maximize internal resources, reduce workload, and increase role clarity.
 - b. Strategies to achieve the goal:
 - i. Ensure that each employee has job clarity about their own role and job.
 - ii. Communicate employee roles and skills to everyone in the organization.
 - iii. Explore the possibility of implementing an employee portal for CVEP.

To accomplish these strategies, the following tasks were identified as "next steps":

- Goal 1 Tasks:
 - With the assistance of a facilitator, managers create a comprehensive, agreed-upon list of clear, concise, measurable organizational goals using the following documents as a starting place:
 - Workforce Development's Regional Plan
 - CVEP's Business Plan
 - CVEP's Blueprint
 - The results of the 4DX training
 - Share goals (and how employees' work helps meet those goals) at a staff meeting.
 - Create and distribute a simple document that describes CVEP goals in varying levels of detail (one-pager, executive summary, and longer document).
- Goal 2 Tasks:
 - Managers review job descriptions with employees, discuss any remaining ambiguities.
 - CVEP provides job training to employees who lack the knowledge, skills, or abilities to perform some aspects of their jobs.
 - Share job descriptions, roles, and skills at a staff meeting.
 - Create/update a detailed organizational chart that includes not only individual names and titles, but also basic job functions and areas of expertise.
 - Create a policy/process where the above tasks are regularly revised and updated.
 - CVEP staff who have used Alignment introduce the portal to upper management and do a training on the tool.

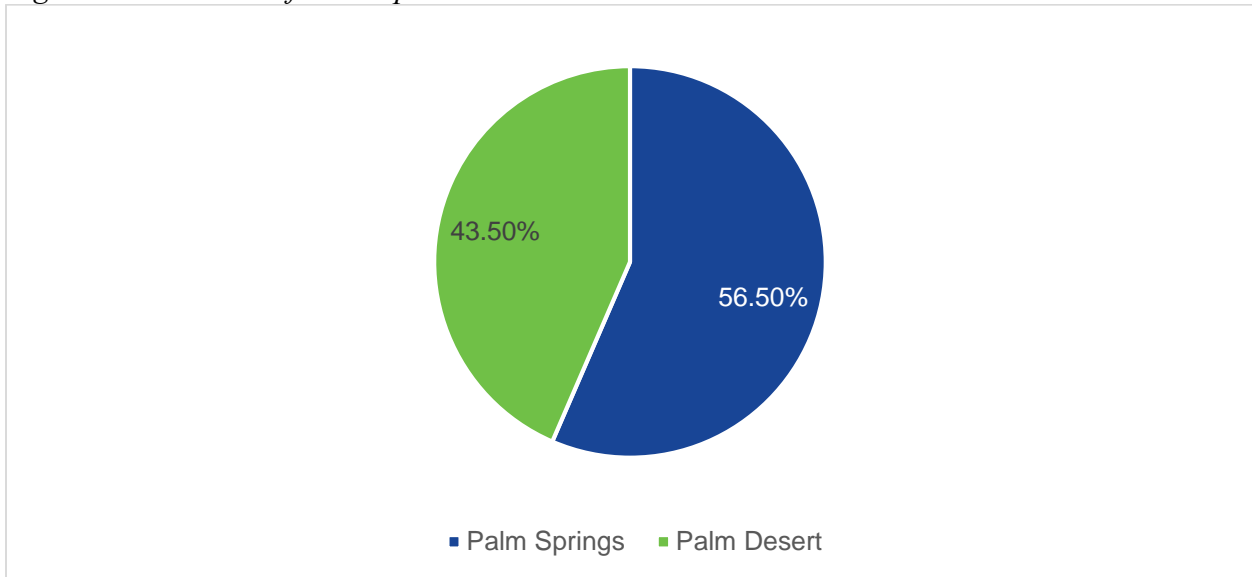
For a matrix representation of this logic model, please see the Appendix A.

Employee Survey Results

A total of 23 employees completed the survey. Since 29 employees were sent the survey, this is a response rate of 79%. However only 20 employees fully completed the survey (that is, answered the majority of the questions), so a more accurate response rate would be 69%. To see the full text of the needs assessment survey, please see Appendix B.

As illustrated in Figure 2, 14 employees from the main office in Palm Springs participated, and 10 employees from the Workforce Excellence office in Palm Desert participated. This indicates that the opinions and needs of both offices are well represented in this survey.

Figure 2. Work Site of Participants

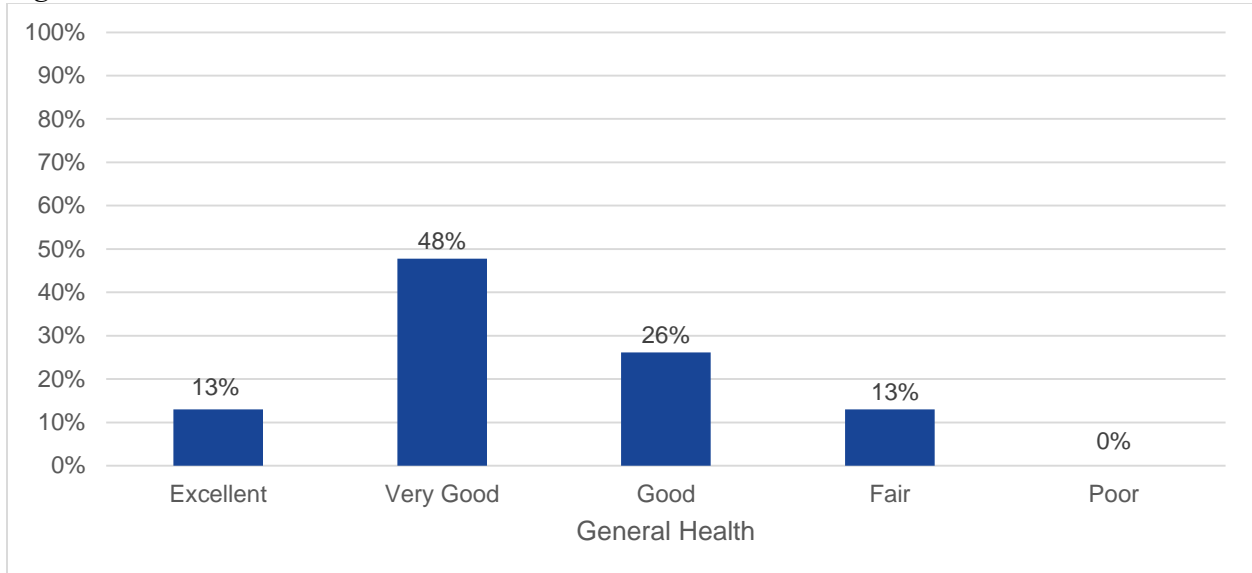


Note. n = 23.

Health

On average, most participants (61%) rated their health as “very good” or “excellent”. However, approximately 12.5% of participants rated their health as “fair”, as illustrated in Figure 3.

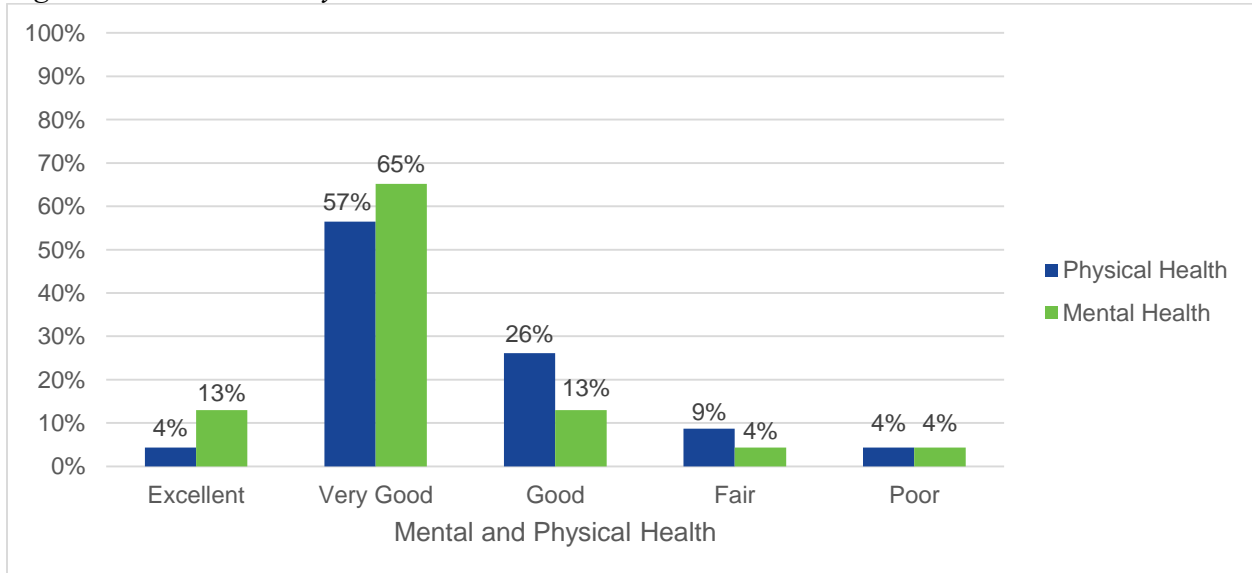
Figure 3. General Health



Note. $n = 23$.

Further questioning on the topic of health indicated that mental health was overall slightly better than physical health, as illustrated in Figure 4.

Figure 4. Mental and Physical Health



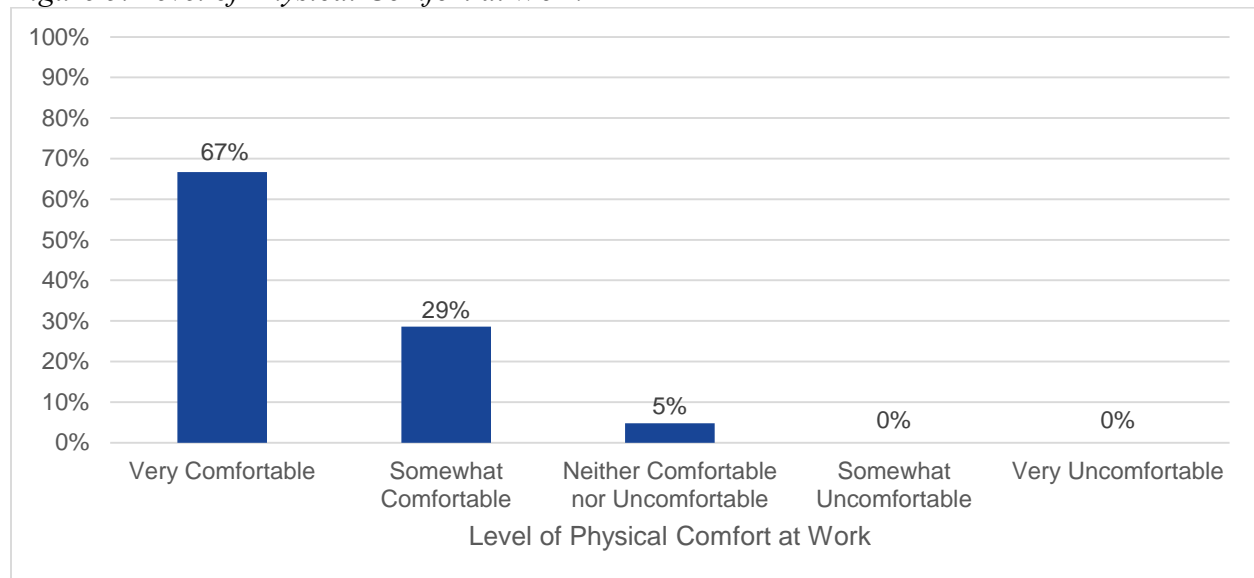
Note. $n = 23$.

Physical Work Environment

CVEP is a very safe environment. The majority of participants (71.4%) have never been injured while at work, and those who have been injured at work have experienced minor (23.8%) to moderate injuries (4.8%). Similarly, very few participants worry about being injured at work—85.7% of participants say they “almost never worry about being hurt at work”, while 14.3% say they “rarely worry about being hurt at work.”

Overall, as illustrated in Figure 5, most employees are physically comfortable at work. No employees rated their level of physical comfort as “somewhat uncomfortable” or “really uncomfortable”.

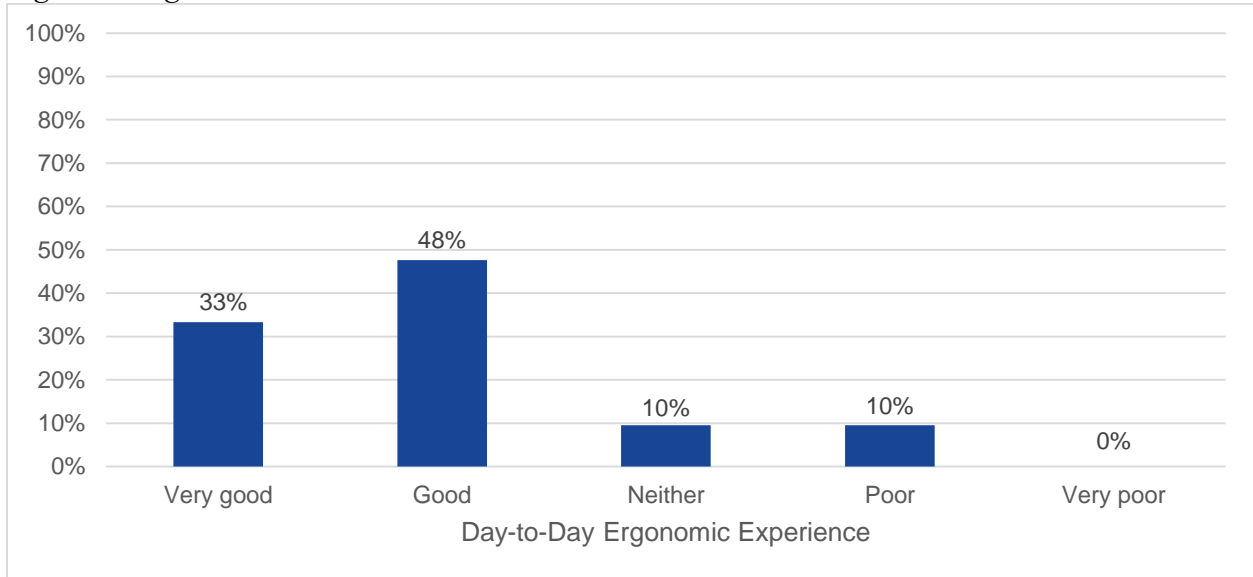
Figure 5. Level of Physical Comfort at Work



Note. n = 21.

When asked, “How would you rate your ergonomics experience in your day-to-day work environment?”, most employees rated their ergonomic experience positively, as illustrated in Figure 6. While some employees did rate their ergonomic experience as neutral or poor, no employees rated their ergonomic experience as “very poor”.

Figure 6. Ergonomics



Note. $n = 21$.

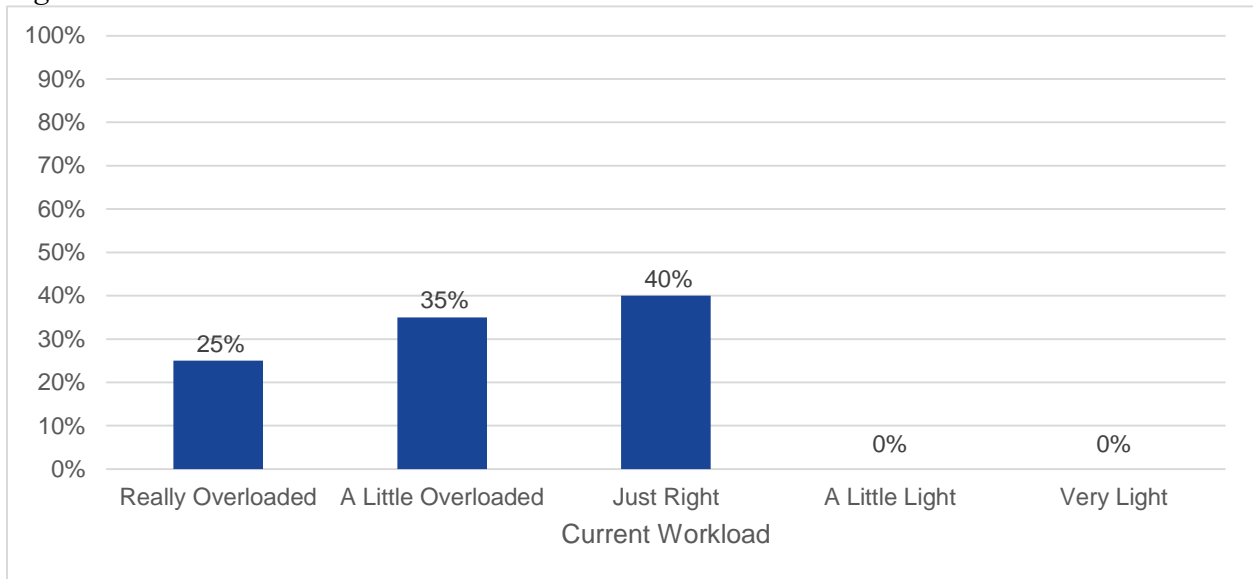
However, several of the open-ended responses indicated that employees are experiencing ergonomic issues that come from a primarily sedentary, computer-based work environment.

Psychosocial Work Environment

Workload

Workload is a considerable issue at CVEP. As illustrated in Figure 7, over half of participants indicated they had too much work at the present time. No participants stated that they had too little work to keep them busy.

Figure 7. Current Workload

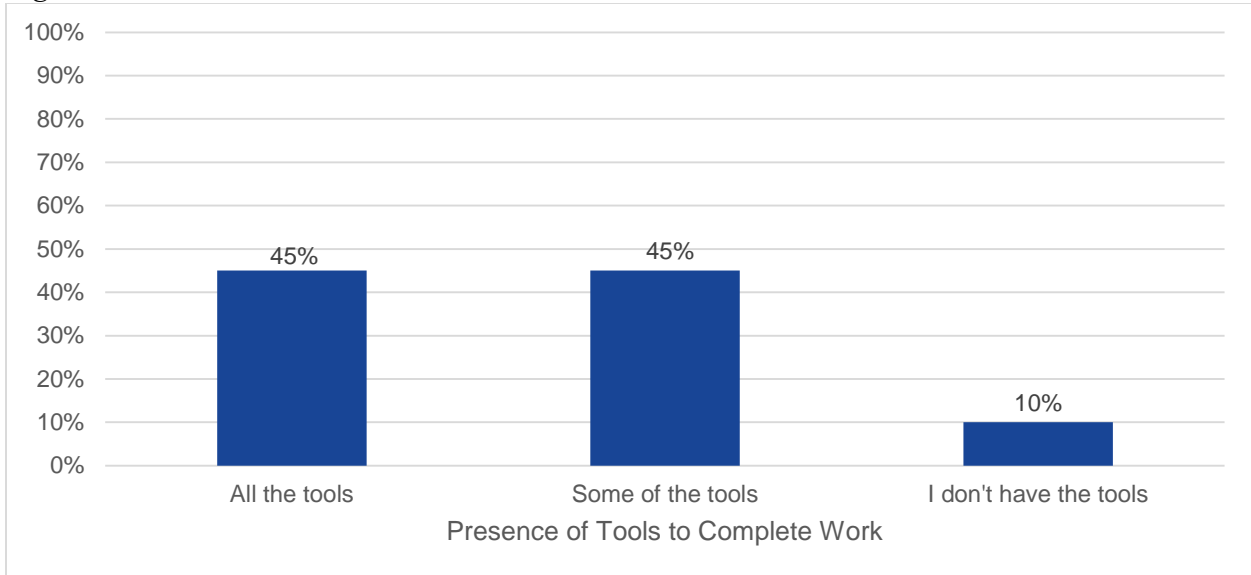


Note. $n = 20$.

Tools

Employees were asked, “Do you feel that you have the tools you need to get your work done? When thinking about ‘tools’, think about whether you have the skills, programs/software, staffing capabilities, or other resources that can help you to do your job effectively and efficiently.” As illustrated in Figure 8, 45% of employees believe they have all the tools they need to do their work. Other employees have “some of the tools, but others would be helpful”, while about 10% of employees don’t have the tools they need to their work effectively and efficiently.

Figure 8. Tools



Note. n = 20.

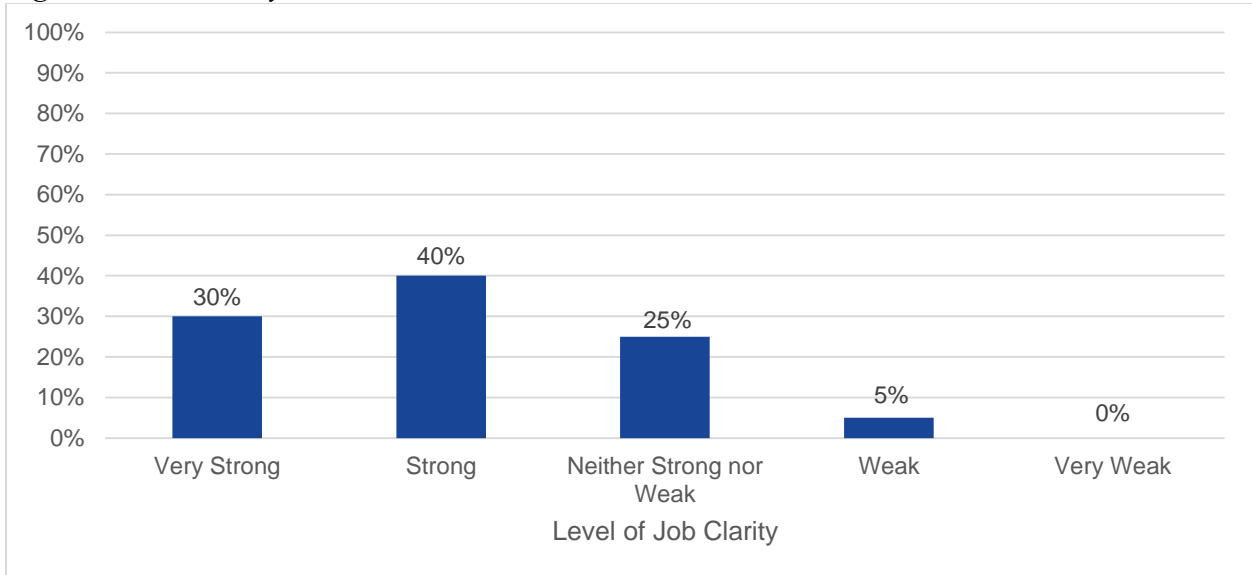
Some of the open-ended responses indicated that the lack of tools may be related to training and the related knowledge, skills and ability.

Job Clarity

The logic modeling results indicated that upper management felt that the employees may be lacking in job clarity. Thus, to assess this, employees were asked, “‘Job clarity’ is the level of understanding you have about what you need to do each day at work in order to really excel at your job and help CVEP succeed. How would you rate your level of job clarity?”

As illustrated in Figure 9, most employees rated their job clarity as “very strong—I know exactly what I need to do each day” or “strong—I know what I need to do in general”.

Figure 9. Job Clarity



Note. $n = 20$.

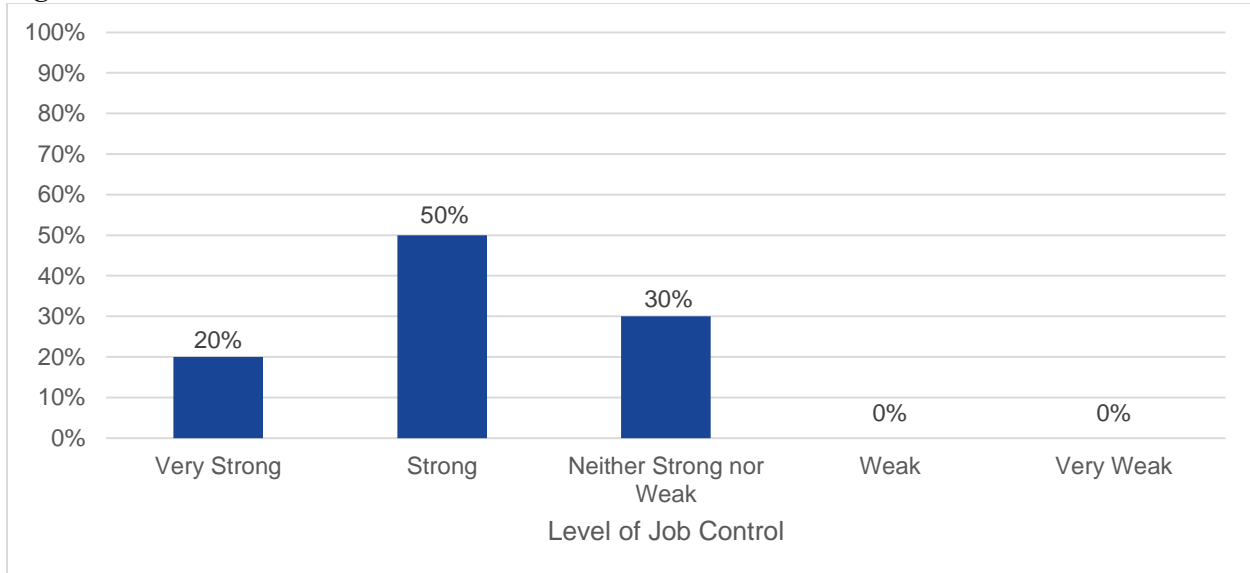
This seems to indicate that most employees know what they need to do each day to support the mission of CVEP. However, open-ended responses indicated that while each individual employee may understand his or her job, understanding of *others'* roles was limited: The lack of clarity about employee job descriptions and individual roles was also echoed in the open-ended responses on the employee survey.

Job Control

Employees were asked, “‘Job control’ is the extent to which you have control over how your work gets done--you get to make decisions about which tasks have priority, how you will accomplish those tasks, and when those tasks get done. How would you rate your level of job control?”

As illustrated in Figure 10, the majority of participants rated their job control as “strong”. No participants rated their job control as weak or very weak.

Figure 10. Job Control



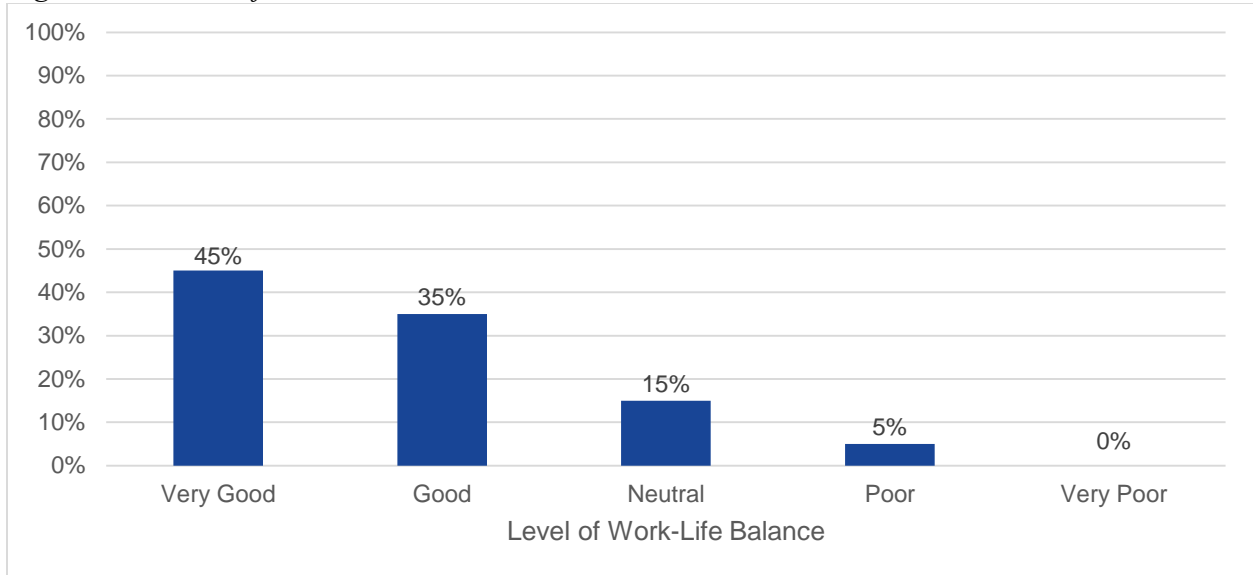
Note. $n = 20$.

Work-Life Balance

Employees were asked, “‘Work-life balance’ is when your work is flexible enough for you to easily meet both your work needs and your needs outside of work (like taking care of kids or parents, managing your household, and seeing healthcare providers when you need it). How would you rate your work-life balance?”

As illustrated in Figure 11, the majority of employees rate their work-life balance as “very good” or “good”, indicating a high level of flexibility at CVEP.

Figure 11. Work-Life Balance



Note. n = 20.

One employee elaborated on how they balance their work and non-work lives due to CVEP’s flexibility: “I like to start work later in the morning so that I can exercise, work through lunch at my desk and always take work home in the evenings.”

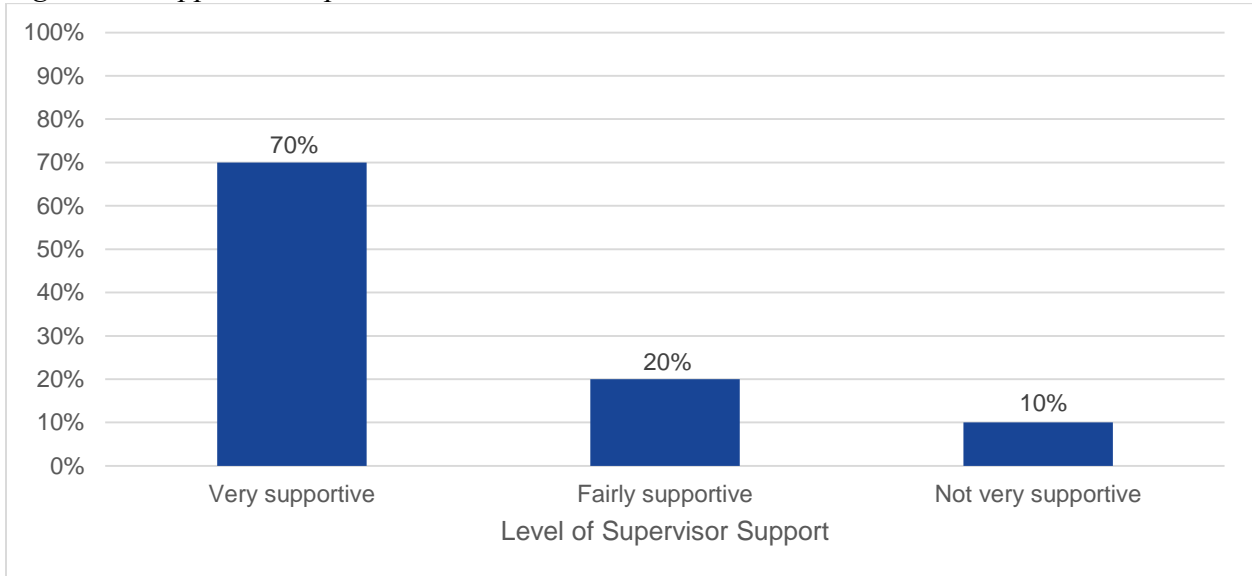
Additionally, another employee mentioned that their favorite thing about working for CVEP is, “the flexibility in work schedule.”

Supportive Supervision

Employees were asked, “How supportive is your immediate supervisor? When thinking about ‘support’, think about whether your supervisor backs you up, provides you with the tools you need to do your job well, is fair and equitable, and/or caring about your personal well-being.”

As illustrated in Figure 12, the majority of employees felt that their immediate supervisor was “very supportive”. No employees rated their immediate supervisor as “not supportive at all”.

Figure 12. Supportive Supervision



Note. n = 20.

While this indicates that the majority of CVEP employees feel supported by their immediate supervisor, the open-ended comments did reveal a disconnect between the employees and the senior management at CVEP.

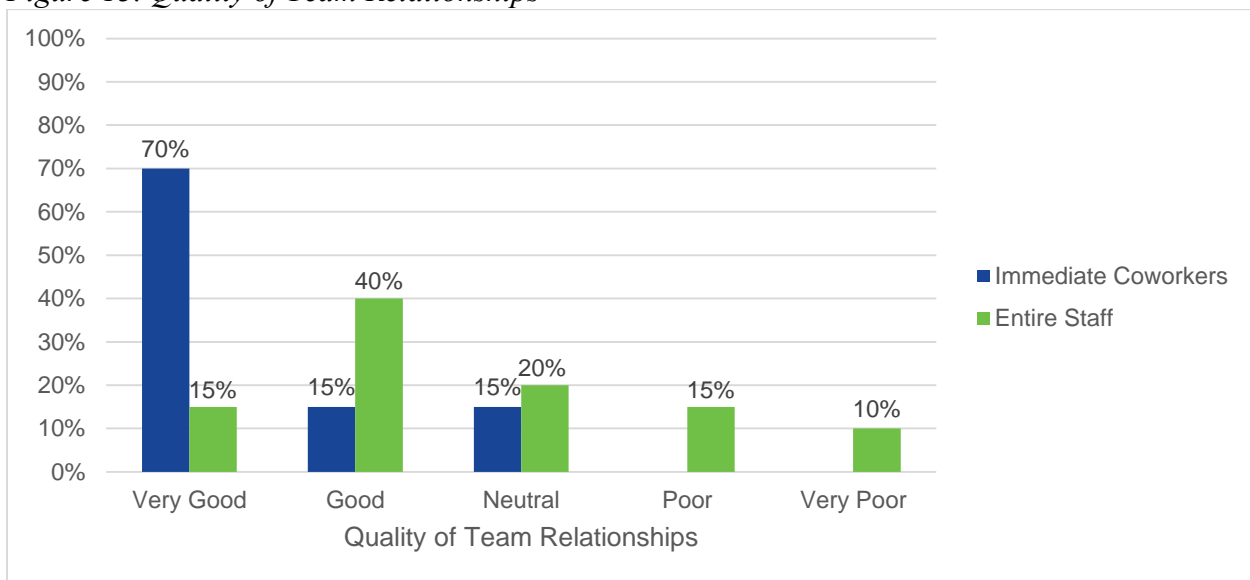
Teams

One theme that emerged during the logic modeling session was that of a sense of a division between the two office locations.

To assess this on the employee survey, employees were first asked, “In general, how would you rate your relationship with your immediate coworkers--the ones that you interact with on a weekly (or more frequent) basis?” Next, employees were asked, “In general, how would you rate your relationship with the other staff members throughout CVEP (the entire staff)?”

As illustrated in Figure 13, most CVEP employees felt that they “are a great team” with their immediate coworkers. However, when expanding this to the staff as a whole, several people rated the team relationship as poor or very poor.

Figure 13. Quality of Team Relationships



Note. $n = 20$.

Open-ended responses confirmed this finding; while employees had great rapport with their immediate coworkers, they struggled with the entire team. Open-ended responses also highlighted the divide between the two geographic locations.

Other Stressors

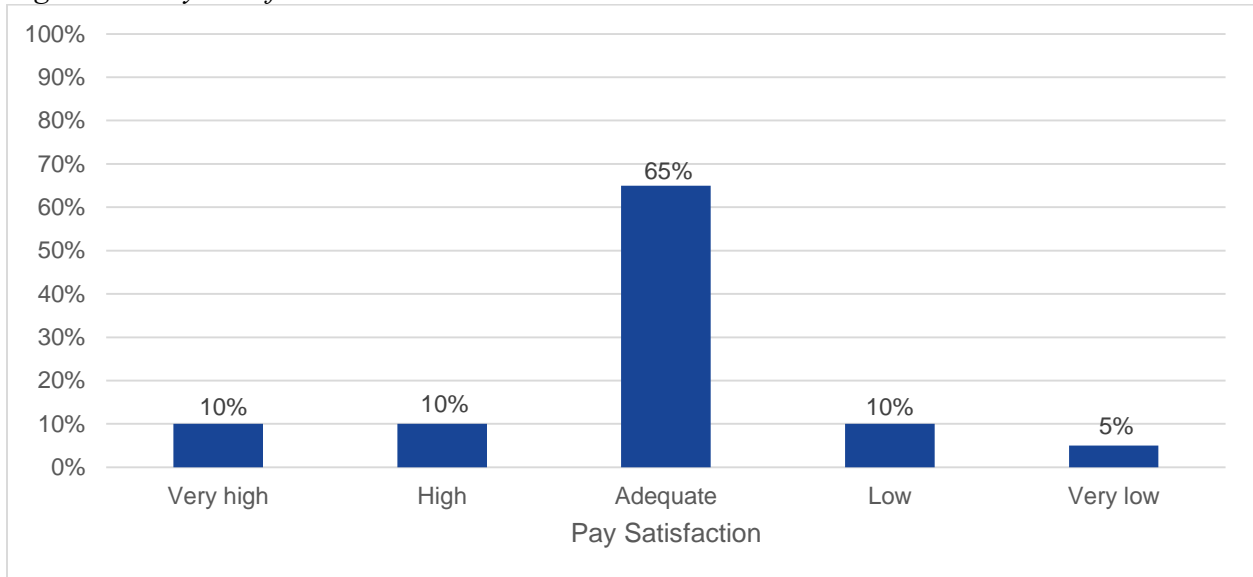
Several of the open-ended responses indicated that stress would be lowered if there was an emphasis placed on enforcing existing policies fairly and equally, and on holding everyone accountable for their work.

Work-Related Resources

Pay

When asked, “How would you rate your satisfaction with your current pay level?”, the majority of CVEP employees considered it “adequate”. Approximately an equal number considered their pay high as those who considered it low, as illustrated in Figure 14.

Figure 14. Pay Satisfaction



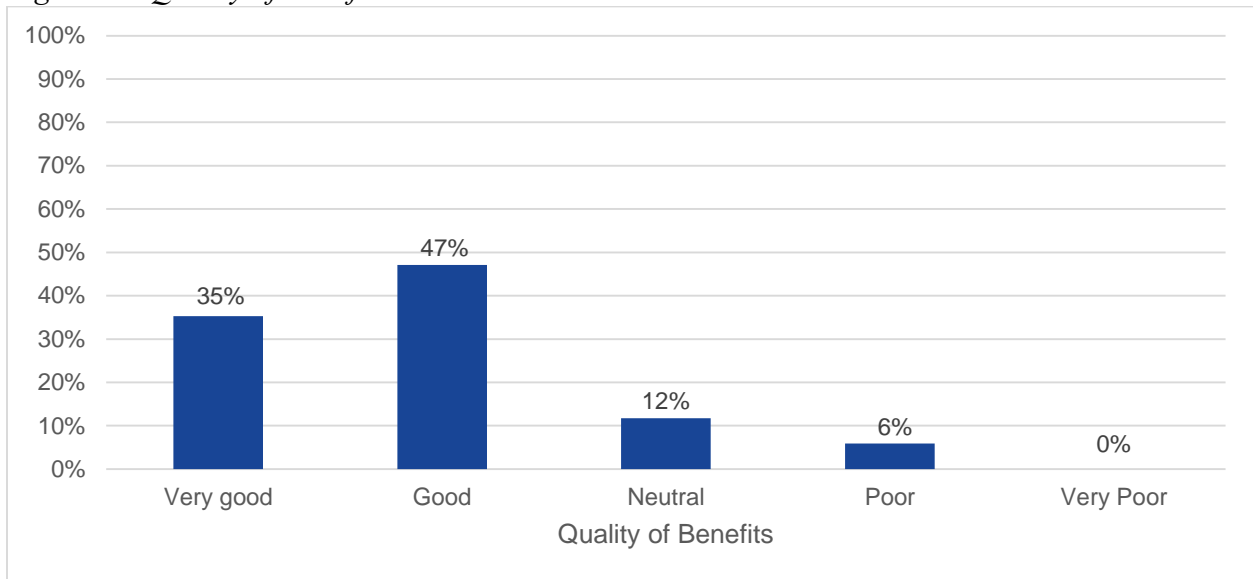
Note. $n = 20$.

Benefits

Employees were asked, “How would you rate the benefits that CVEP provides for you? ‘Benefits’ includes health insurance, 401k plans, and other employer-provided benefits.”

As illustrated in Figure 15, the majority of employees rated their benefits as “very good” or “good”. No employees rated the quality of the benefits as “very poor”.

Figure 15. Quality of Benefits



Note. $n = 17$. A total of 3 employees (excluded from this chart) indicated that CVEP does not provide them with any benefits.

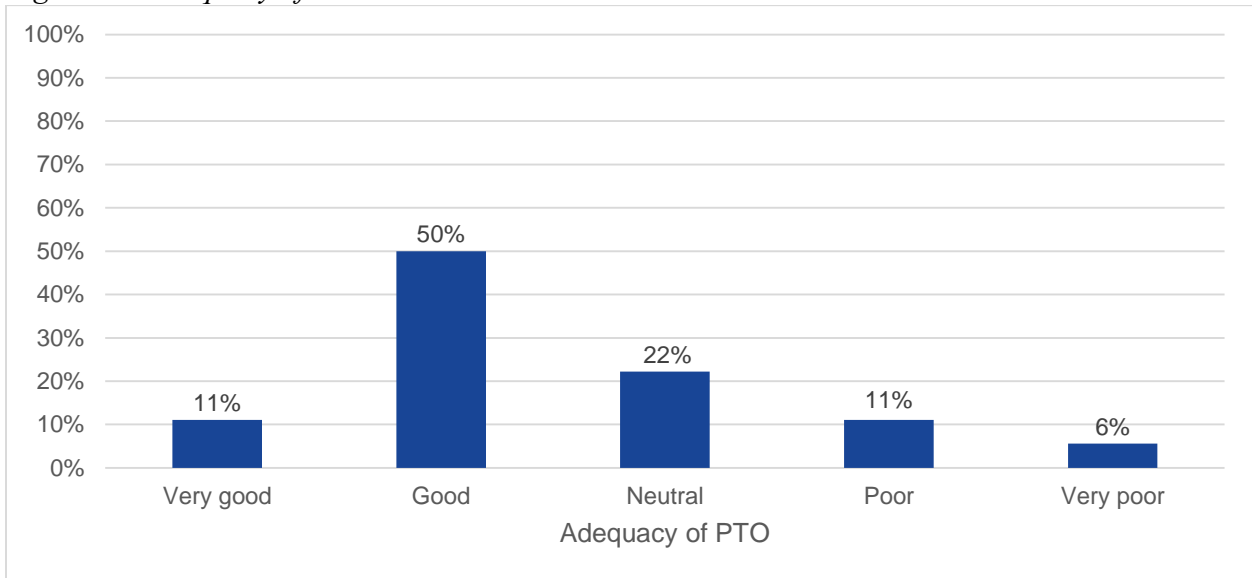
When asked, “If you could change anything to make your compensation, benefits, or other work-related perks better for you personally, what would that change be?”, several employees mentioned benefits they would like to improve, including increased 401k match, tuition reimbursement, and a better dental and medical package.

Paid Time Off

Employees were asked, “How would you rate the paid time off (PTO) package CVEP provides for you? ‘PTO’ includes vacation, holidays, and sick leave.”

As illustrated in Figure 16, half of CVEP employees rated their PTO as “good” indicating that they have plenty of PTO days to meet their needs and wants. However, about 16% of employees need or want more PTO days than they currently have.

Figure 16. Adequacy of PTO



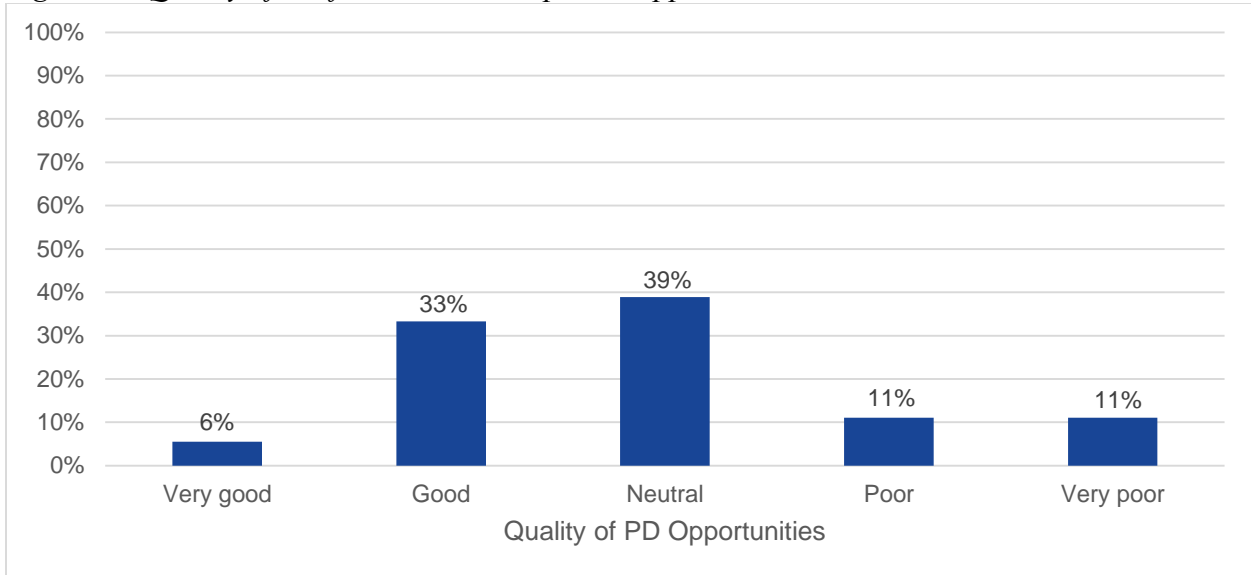
Note. $n = 18$. A total of 2 employees (excluded from this chart) indicated that CVEP does not provide them with any PTO.

Professional Development

Employees were asked, “How would you rate the development opportunities that CVEP provides for you? ‘Development opportunities’ include trainings, workshops, or other opportunities to develop your existing skills, teach you new skills, or make you more marketable as an employee.”

As illustrated in Figure 17, the majority of CVEP employees rated their professional development opportunities as neutral or lower.

Figure 17. Quality of Professional Development Opportunities



Note. n = 18. A total of 2 employees (excluded from this chart) indicated that CVEP does not provide them with any development opportunities.

The open-ended responses indicated that staff members not only wanted better professional development opportunities, but that they also wanted the time to take those opportunities.

Needs Assessment Conclusion

As a result of the needs assessment, HARC made the following recommendations:

Logic Modeling Recommendations

In regards to the first goal identified through the logic modeling process, HARC recommended that CVEP employ a facilitator to create a comprehensive, agreed-upon list of clear, concise, and measurable organizational goals. The facilitator should lead a session with CVEP leadership to develop these goals, put them together in the series of formats, revise upon request, and present them at a CVEP meeting. HARC recommended selecting a facilitator from Regional Access Project Foundation's (RAP) directory of Technical Assistant Consultants, as several have experience with strategic planning.

In regards to the second goal identified in the logic modeling process, HARC recommended that CVEP require each manager to meet one-on-one with their employees to review their job descriptions and to ensure that each individual has clarity about their own jobs.

Next, HARC recommended that CVEP employ a facilitator to work with employees to create a detailed organizational chart that includes names, titles, job descriptions, roles, and expertise. This organizational chart should be reviewed by CVEP upper management and revised before distribution to all employees. The organizational chart should be distributed electronically as well as presented at a staff meeting. HARC recommended a consultant, identified through RAP's directory, with expertise in human resources and job descriptions, Ms. Claudell Maggio-Greear.

Finally, HARC recommended that CVEP adopt a policy to update the organizational chart whenever a new full-time employee is hired, and identify a specific employee responsible for updating said chart.

Physical Work Environment Recommendations

Overall, it is clear that the physical work environment at CVEP is relatively good. The hazards and risks of physical exposure that come in more active workplaces are not present at CVEP, as most work is done at desks on computers.

However, computer work comes with its own set of risks and hazards, which, according to the open-ended responses, are somewhat of an issue at CVEP. Thus, to improve the physical work environment, an ergonomic assessment was recommended.

Psychosocial Work Environment Recommendations

It was clear from both the logic modeling session and the employee survey that the divide between the two departments in their two separate locations was a source of serious stress for employees. There was also a divide between senior management and some of the general staff. In order to address these issues, HARC recommended some team-building exercises, led by an external facilitator with expertise in this area.

The lack of training and other tools to complete work effectively and efficiently was also an issue. Ideally, hopefully the recommendations made based on the logic modeling as well as those made based on the work-related resources portion of the employee survey (see below) would address this issue. By providing employees with the skills and tools they need, efficiency should increase, and thereby decrease the excessive workload issues.

Several employees reported specific interventions or changes that would increase their satisfaction at work. For example:

- Having one or two day a week of yoga or some type of fitness class to relieve stress and come back with a clear mind and motivated.
- Bring your dog to work policy or more flexibility with working remotely on X amount of days per week/month
- It would be great to also have a Health Wellness program that could focus on mental and physical health.

These are all excellent suggestions for ways to cope with stress in healthy ways. These suggestions should be considered as potential CVEP programs or policies to help employees cope with the stress of heavy workloads in a positive way.

Several of the open-ended responses identified inconsistency and favoritism, as well as lack of accountability, as significant sources of stress and feelings of injustice. To address this, HARC recommended that senior management staff attend a workshop training to improve their management skills.

Work-Related Resources Recommendations

Overall, staff satisfaction with work-related resources was relatively high. One respondent wrote, “I am very satisfied with my compensation, benefits, and perks”. CVEP should continue to offer competitive salary, PTO, and benefits, and strive to improve these when it is financially viable, as this will help CVEP to attract and retain top talent.

Satisfaction with professional development was comparatively low. Thus, HARC recommended that CVEP conduct an informal survey (to be facilitated by HARC) to assess which particular professional development opportunities are most needed. Then, HARC could help CVEP to identify providers of those professional development opportunities.

As illustrated in the open-ended comments, it is not enough to simply offer professional development—there must be time enough for the employees to actually take the opportunities. Thus, HARC recommended making a policy change, such that every employee must complete at least one professional development opportunity per fiscal year (at no cost to the individual employees). CVEP senior management should clearly convey to all managers the importance of supporting this policy. Buy-in from all managers on the importance of this policy is critical to shifting the culture at CVEP to one that truly values employee development, where employees feel they are able to take the available opportunities. Additionally, the previous recommendations made based upon the psychosocial section of the employee survey may help reduce workload such that employees feel that they have time to use the provided opportunity.

INTERVENTIONS

After reviewing the recommendations that HARC made (based on the logic modeling sessions and the employee survey results), CVEP staff chose to implement interventions to address both the physical work environment and the psychosocial work environment. CVEP did not choose to implement any interventions related to work-related resources at this time.

Physical Work Environment Intervention

CVEP leadership decided that rather than require ergonomic assessments for all employees, this intervention should be optional for employees. A total of eight CVEP employees, representing both offices, chose to get ergonomic assessments. HARC contracted with New Beginning Physical Therapy to provide the ergonomic assessments. Ms. Gina Malloy conducted the assessments. Ms. Malloy is a licensed physical therapist, certified in Neuro-Developmental Treatment.

Ms. Malloy made several recommendations for each of the eight participating employees. Many employees were given similar recommendations, including implementing window coverings to reduce glare, using diffuse lighting instead of florescent to reduce eye strain, adjusting chair and screen heights to reduce muscle strain, and obtaining headsets to use with the telephone.

Psychosocial Work Environment Intervention

CVEP leadership decided to have an outside facilitator, Ms. Claudell Greear-Maggio, provide the senior leadership staff with a team building training. Ms. Greear-Maggio is the CEO of Greear Consultant Group LLC, a firm of professional advisors in the fields of human resources, operations, safety, and security. Ms. Greear-Maggio is a certified Professional in Human Resources (PHR) with nearly 30 years of experience in the human resources field. Ms. Greear-Maggio has worked with many Coachella Valley nonprofits in her role as a Technical Assistance Consultant with the Regional Access Project Foundation.

Half-Day Leadership Seminar

The psychosocial intervention began with a half-day off-site seminar in August 2014. The CVEP CEO, Tom Flavin, and five additional senior leadership staff (from both offices) attended this training. This group of six leaders was called the “Employee Leadership Council”, or ELC. At this seminar, Ms. Greear-Maggio introduced the ELC to a training called the Five Dysfunctions of a Team training. The ELC got to know each other better, and identified a lack of face-to-face communication between the two offices as a critical barrier to the success of CVEP. Upon closing of this session, the ELC set a 30-day goal to job shadow other managers to continue to learn more about the individual offices and how they both are critical to the success of CVEP as a whole.

Intra-Office Job Shadowing

Thus, in September, each of the six members of the ELC spent a day job shadowing another leader in the other office. All six members were able to do this, and all reported that they were impressed by what the other office was doing, and what their fellow leaders brought to the table.

Human Resource Assessment

Ms. Greear-Maggio reviewed current administrative and human resources practices that are utilized by CVEP. On October 6, 2014, Ms. Greear-Maggio delivered a written report summarizing her findings, and recommending the following actions:

- CVEP should develop job descriptions that clearly define essential functions and chain of command. Subsequently revisit the organizational chart to revise.
- CVEP has a lack of training for managers on key employment issues.
- CVEP has some procedure deficits and opportunities for improving administrative processes.

Retreat

Ms. Greear-Maggio facilitated a full-length two-day retreat with the six members of the ELC on September 29th and 30th. At the retreat, the ELC set a thematic goal: “We will design and implement an efficient financial and human resource infrastructure that ensures our organizational excellence by June 1, 2015.” The ELC also identified a need for a financial consultant with expertise in SAGE software. With facilitation from Ms. Greear-Maggio, the ELC established several 10-month objectives, including:

- Compliance with all funding sources
- Standardize expense reports
- Respond to the findings of the HR assessment conducted by Ms. Greear-Maggio)
- Meet with Project Directors to identify their needs
- Have the Executive Committee approve a policy for timely employee reviews that are consistent

To build the strength of the team members in the two offices, the ELC also scheduled monthly meetings through June 1, 2015. The ELC also agreed to meet together twice prior to the next upcoming all-staff meeting to collaborate and ensure that their new message of a unified CVEP was consistent throughout all six leaders.

All-Staff Meeting

The ELC developed and delivered a carefully planned program at the October 16 All-Staff Meeting. At this meeting, members of the ELC shared the work that they had been doing with Ms. Greear-Maggio. The entire staff worked together on team building exercises, and also shared some of the ergonomic lessons learned from the assessments by Ms. Malloy.

To read an in-depth description of this intervention, as written by Ms. Greear-Maggio, please see Appendix C.

PROGRAM EVALUATION

Ideally, program evaluation would occur many months after the interventions, in order to assess long-term change and the impacts on health and well-being. This is especially important when assessing health outcomes, as health takes time to alter. However, for the sake of timeliness, an initial program evaluation was conducted in December 2014 to assess what changes, if any, occurred as a result of the interventions.

Program Evaluation Method

An online survey was developed and administered by HARC in early December 2014. Two versions were created: one for the leadership team who worked closely with Ms. Greear-Maggio (6 people), and another for the rest of the staff. The two survey versions were virtually identical; however, the leadership survey contained additional questions about their work with Ms. Greear-Maggio.

At the start of the project, there were 29 CVEP employees who were invited to participate in the needs assessment. However, one of the 29 had responded to the needs assessment recruitment stating that, as a contractor, they would not be participating in the project, and thus did not need to receive further emails about the project. Thus, the list was reduced to 28. When additional emails went out about the ergonomic assessments in July 2014, two more employees opted out, citing the same reason. Thus, the list was further reduced to 26 employees. Finally, two additional employees who participated in the initial needs assessment were excluded from the program evaluation survey: one was no longer employed by CVEP, and the other was on an extended leave.

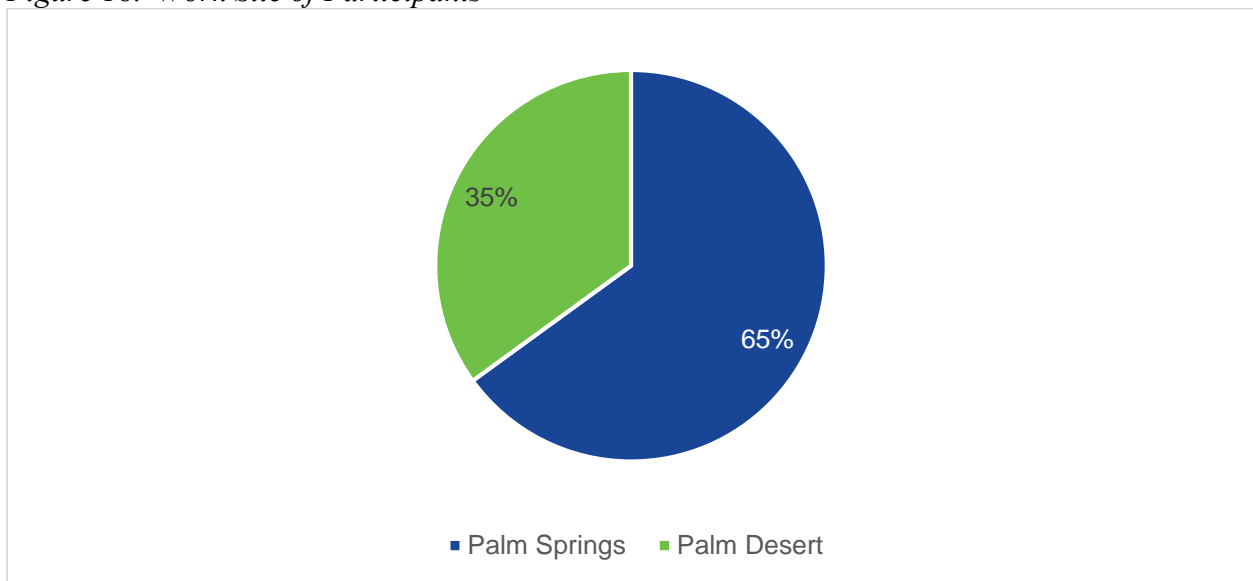
Thus, the program evaluation survey was sent to 24 employees on Tuesday, December 5, 2014 around 10:00 am. A personalized reminder was sent to all employees who had not yet participated on Thursday, December 4, 2014, around 3 pm. A final reminder was sent to non-participating employees on Tuesday, December 9, 2014 around 9 am. The survey was closed on Monday, December 15, 2014.

Program Evaluation Results

A total of 20 employees completed the program evaluation survey, a response rate of 83.3%. As 20 participants fully completed the needs assessment survey (although not necessarily the same 20 employees at survey), this allows for strong comparisons between the initial needs assessment (“Time 1”) and the post-intervention program evaluation (“Time 2”).

As illustrated in Figure 18, 13 employees from the main office in Palm Springs participated, and 7 employees from the Workforce Excellence office in Palm Desert participated. It should be noted that one of the main office employees also spent time in the newly opened Indio office (which was not open at the time of the needs assessment).

Figure 18. Work Site of Participants

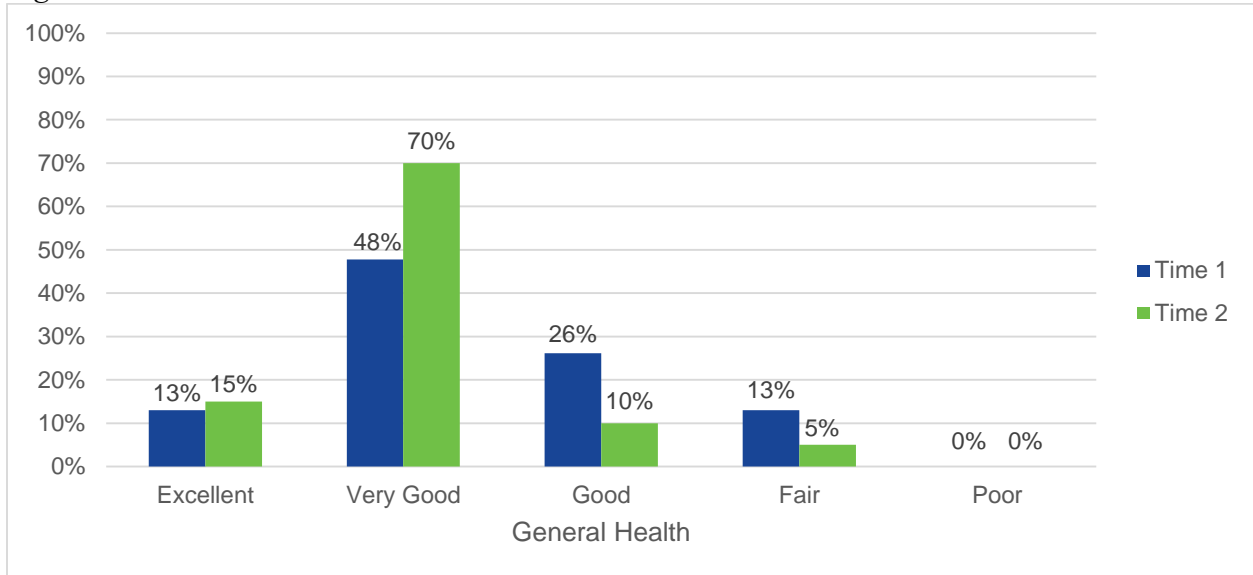


Note. $n = 20$.

Health

On average, most participants (85%) rated their health as “very good” or “excellent”. No participants rated their health to be “poor”. As illustrated in Figure 19, general health was higher at the time of the program evaluation (Time 2) than at the initial needs assessment (Time 1).

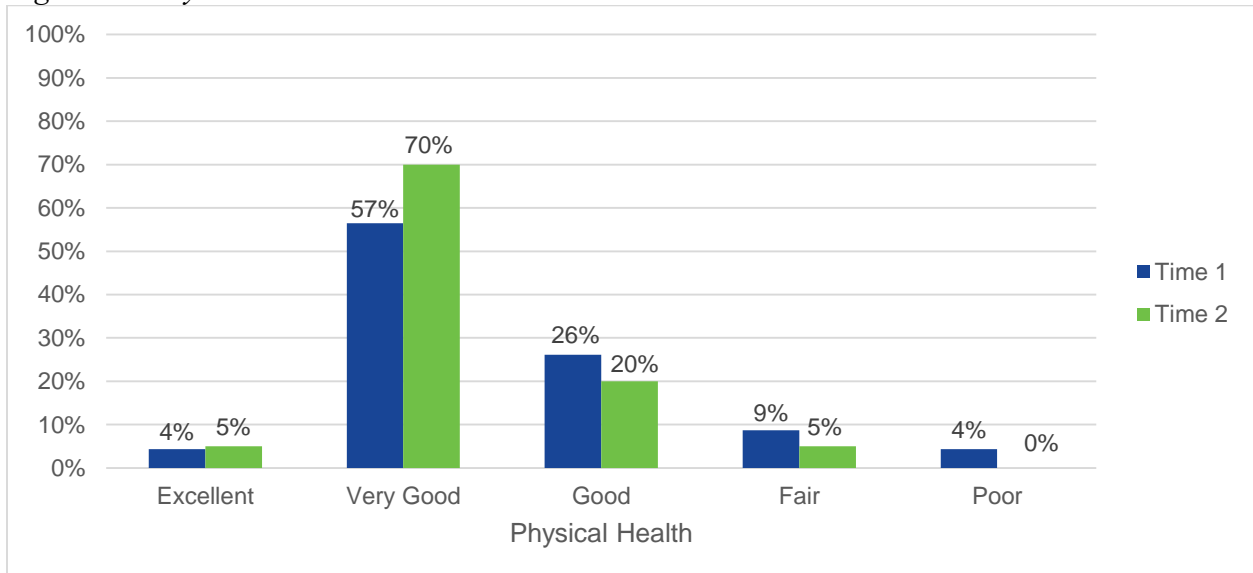
Figure 19. General Health



Note. n Time 1 = 23, n Time 2 = 20.

As illustrated in Figure 20 physical health was slightly improved—more participants rated their physical health “very good”, and fewer rated it “fair” or “poor” when compared to the status at the needs assessment.

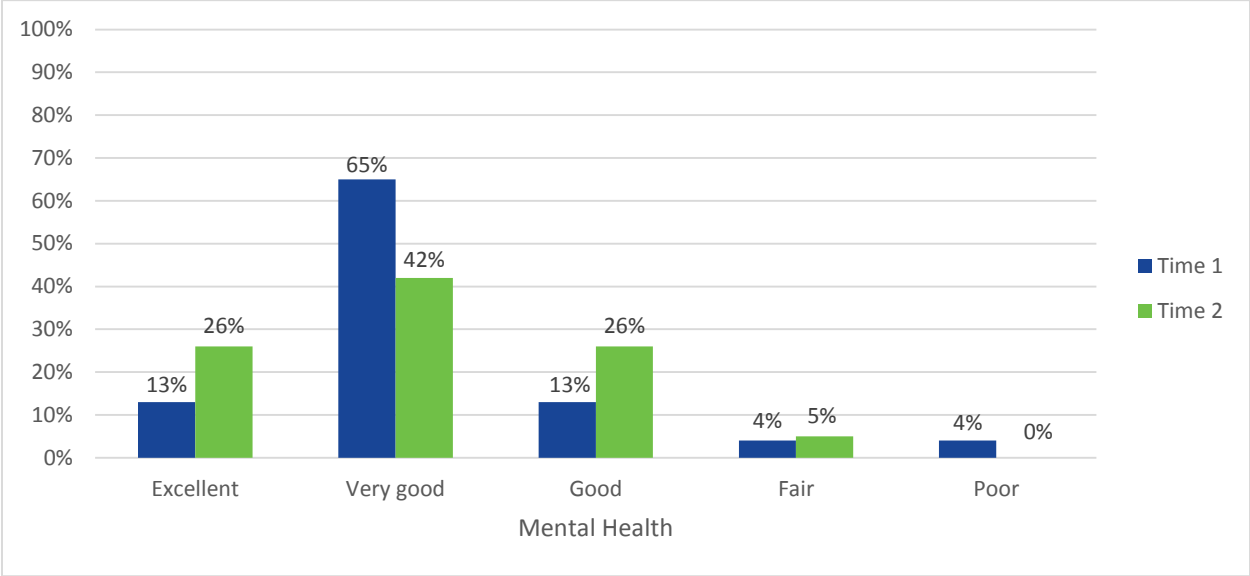
Figure 20. Physical Health



Note. Time 1 n = 23, Time 2 n = 20.

As illustrated in Figure 21, mental health was more variable than physical health. As at Time 1, most participants had “good” or better mental health at Time 2.

Figure 21. Mental Health



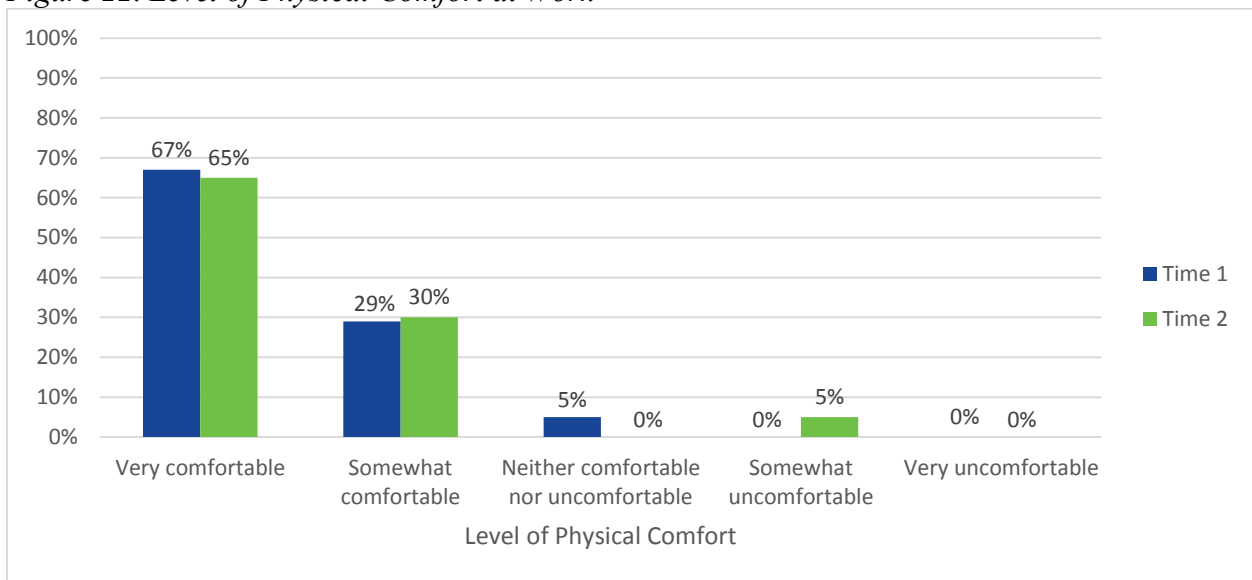
Note. Time 1 n = 23, Time 2 n = 19.

Physical Work Environment

CVEP is a very safe environment. The majority of participants (85.0%) have never been injured while at work, and those who have been injured at work have experienced minor (10.0%) to moderate injuries (5.0%). Similarly, very few participants worry about being injured at work—95.0% of participants say they “almost never worry about being hurt at work”.

Overall, as illustrated in Figure 22, most employees are physically comfortable at work at both time points. There was very little change in level of physical comfort over time between the June needs assessment and the December program evaluation.

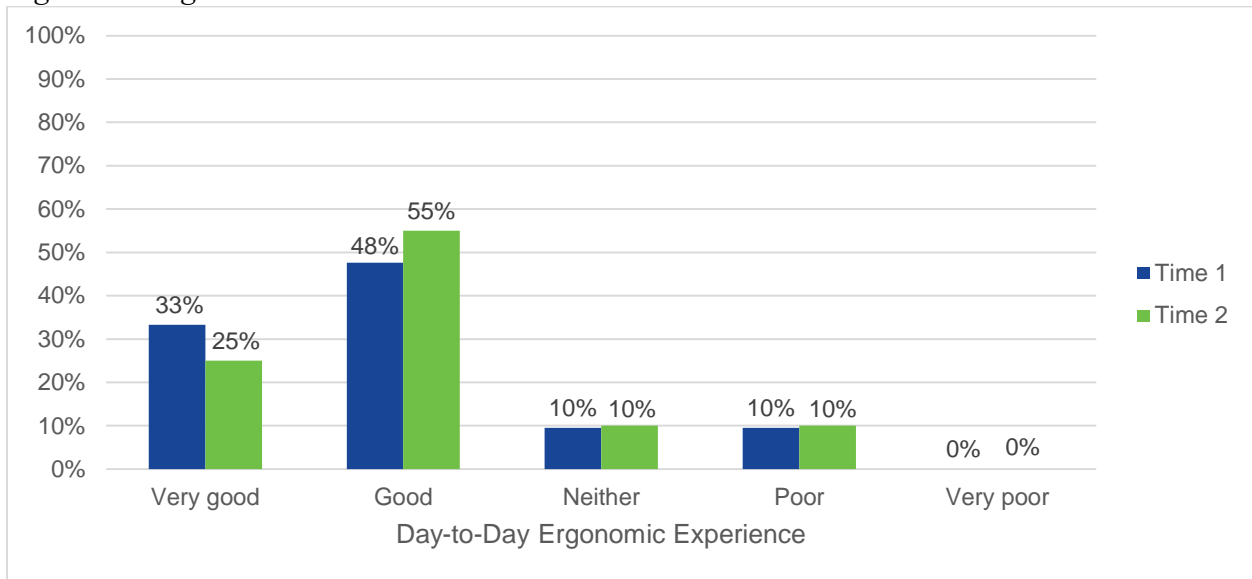
Figure 22. Level of Physical Comfort at Work



Note. Time 1 $n = 21$. Time 2 $n = 20$.

When asked, “How would you rate your ergonomics experience in your day-to-day work environment?”, most employees rated their ergonomic experience positively at both Time 1 and Time 2, as illustrated in Figure 23. While some employees did rate their ergonomic experience as neutral or poor, no employees rated their ergonomic experience as “very poor”. There were no significant changes in ergonomic ratings between Time 1 (needs assessment) and Time 2 (program evaluation).

Figure 23. Ergonomics



Note. Time 1 $n = 21$. Time 2 $n = 20$.

Physical Work Environment Interventions

Six of the employees who completed the program evaluation survey took advantage of the ergonomic assessments that were offered. All six indicated that they had consequently implemented some of the recommended changes to their workspace (as versus “all” or “none” of the recommended changes).

Open-ended comments indicated that the employees who received the assessments felt that the recommendations were valuable and that the experience was a positive one. For example, one employee stated, “It helped me better understand how to set-up my office space, so as to reduce physical strain while at work.” Another said, “It made me aware of the source of occasional physical discomfort stems from. I had no idea that I habitually sit in positions that cause physical strains. I am now aware and have made efforts to improve and address them.”

However, many of the changes Ms. Malloy suggested were ones that required new purchases—such as a new chair, or wireless keyboard. At this time, no steps had been taken to acquire such items for the employees, and thus, the changes they could implement on their own were fairly limited.

This lack of full implementation likely contributes to the lack of improvement in physical comfort and/or ergonomics in the workplace from Time 1 to Time 2. Thus, at this time, HARC urges CVEP managers to ask each of their employees what, if anything, they would like to purchase in order to improve their ergonomics in their office. Such items should then be ordered promptly, and implemented as soon as possible.

Psychosocial Work Environment

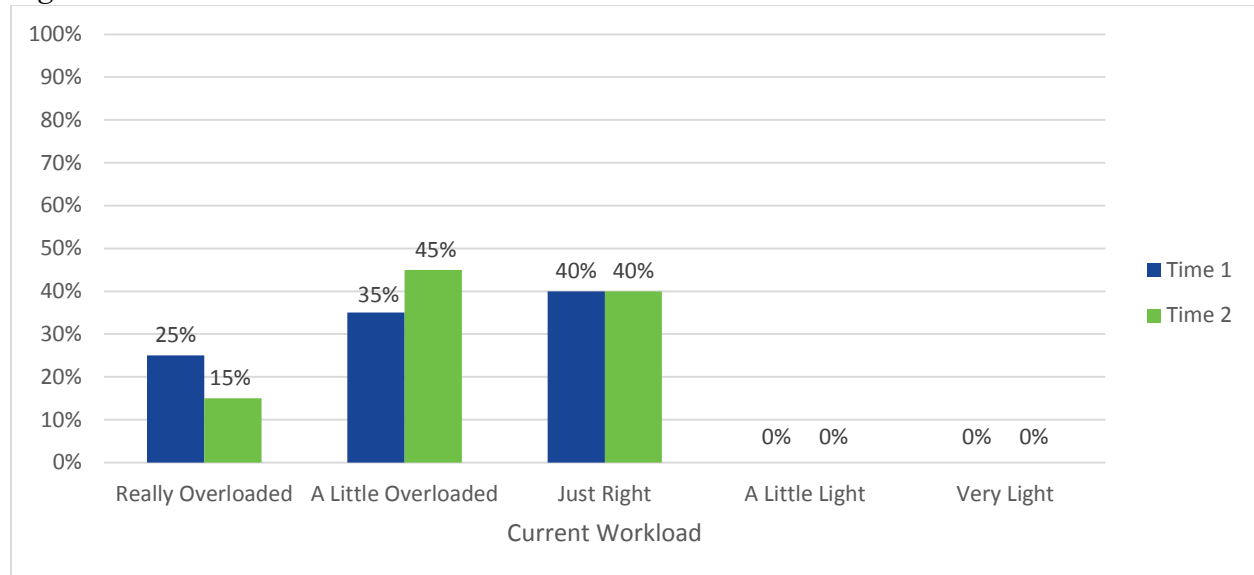
Workload

Workload is a considerable issue at CVEP. As illustrated in Figure 24, over half of participants indicated they had too much work at the present time. No participants stated that they had too little work to keep them busy.

The number of participants that felt “really overloaded” decreased from Time 1 (June) to Time 2 (December). Part of this may be due to the cyclical nature of work at the Workforce Excellence office; their workload ebbs and flows with the school year, and thus, may be part of the reason for this change.

Over the course of the project, workload improved somewhat, but CVEP employees remain overloaded as a whole.

Figure 24. Current Workload



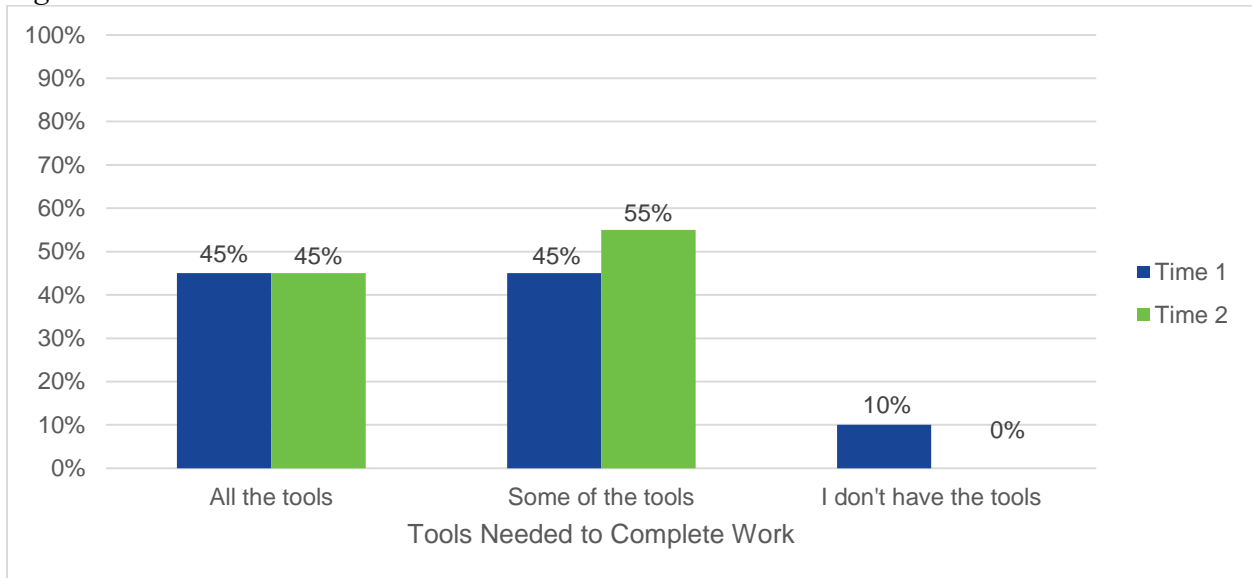
Note. Time 1 $n = 20$, Time 2 $n = 20$.

Tools

Employees were asked, “Do you feel that you have the tools you need to get your work done? When thinking about ‘tools’, think about whether you have the skills, programs/software, staffing capabilities, or other resources that can help you to do your job effectively and efficiently.”

As illustrated in Figure 25, 45% of employees believe they have all the tools they need to do their work. This did not change over the course of the program. At Time 2, all participating CVEP employees had at least some of the tool they need to do their job adequately. However, there is still room for improvement with about half of the staff members.

Figure 25. Tools



Note. n = 20.

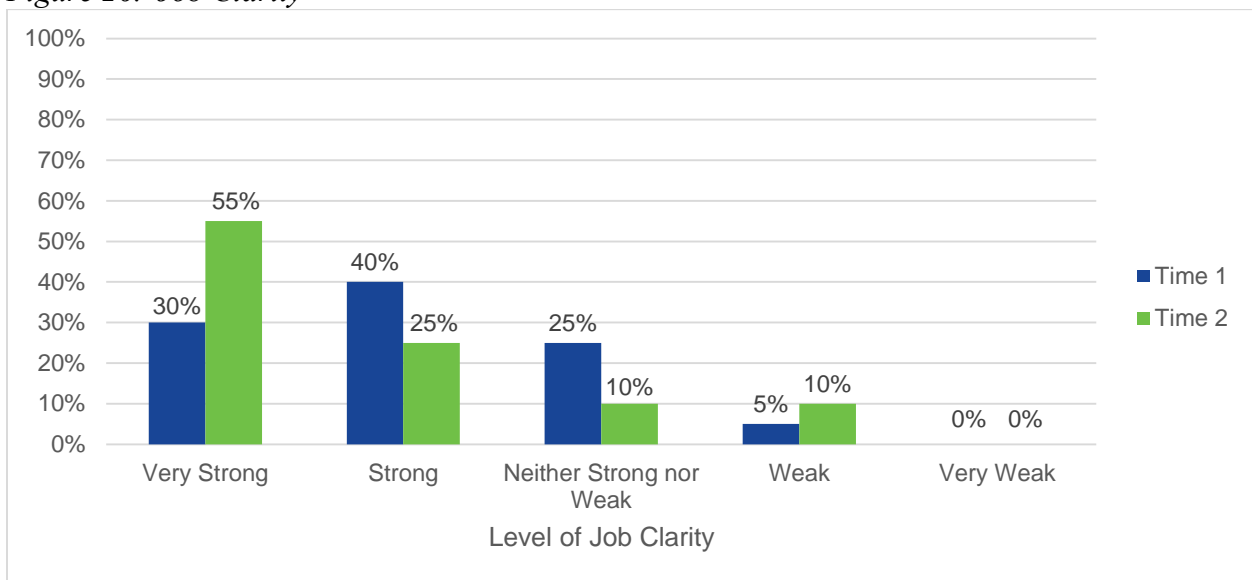
Job Clarity

The logic modeling results indicated that upper management felt that the employees may be lacking in job clarity. Thus, to assess this, employees were asked, “‘Job clarity’ is the level of understanding you have about what you need to do each day at work in order to really excel at your job and help CVEP succeed. How would you rate your level of job clarity?”

As illustrated in Figure 26, most employees rated their job clarity as “very strong—I know exactly what I need to do each day” or “strong—I know what I need to do in general”.

The level of job clarity rose over the course of the project; as illustrated in Figure 26, about half of participants now have very strong job clarity. This is encouraging, although there is still improvements to be made for about 20% of participants.

Figure 26. Job Clarity



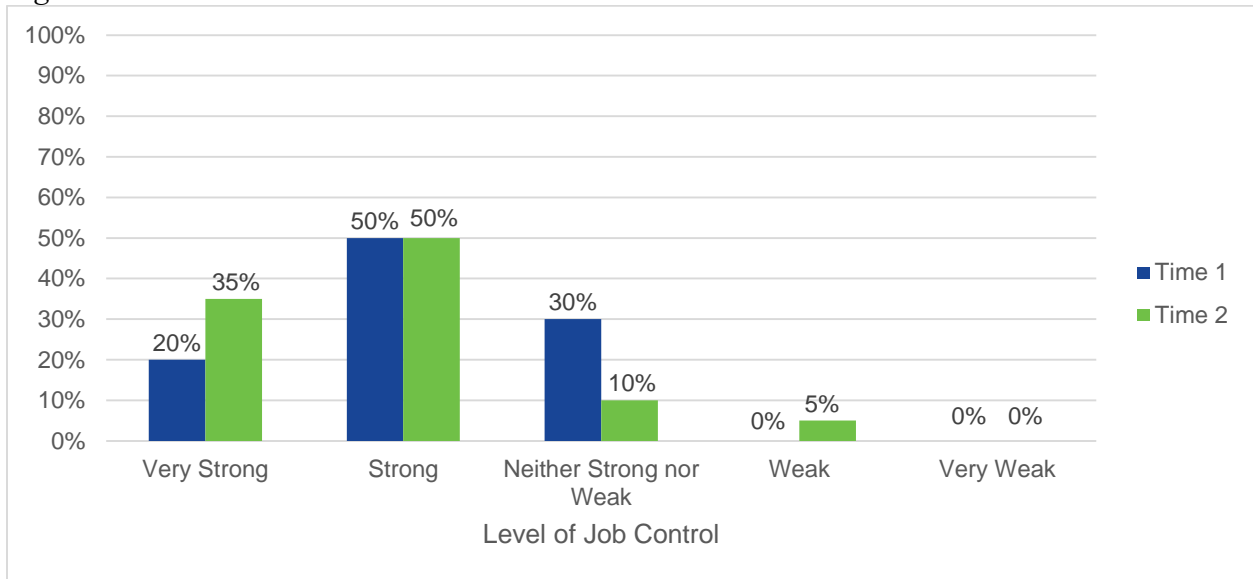
Note. $n = 20$.

Job Control

Employees were asked, “‘Job control’ is the extent to which you have control over how your work gets done--you get to make decisions about which tasks have priority, how you will accomplish those tasks, and when those tasks get done. How would you rate your level of job control?”

As illustrated in Figure 27, the majority of participants rated their job control as “strong” or “very strong” at both assessments. Overall, feelings of job control have increased from Time 1 to Time 2, although progress needs to be made with about 15% of participants.

Figure 27. Job Control



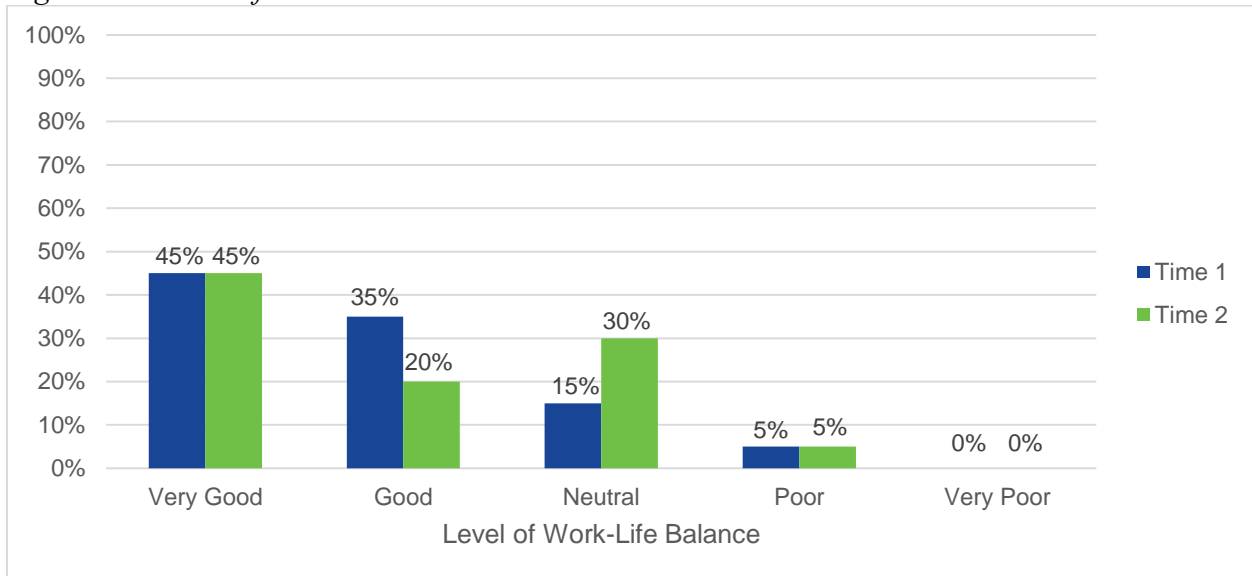
Note. n = 20.

Work-Life Balance

Employees were asked, “‘Work-life balance’ is when your work is flexible enough for you to easily meet both your work needs and your needs outside of work (like taking care of kids or parents, managing your household, and seeing healthcare providers when you need it). How would you rate your work-life balance?”

As illustrated in Figure 28, about half of participants at both time points felt that their work-life balance was very good. Thankfully, very few participants had a negative level of work-life balance. However, the number of employees who rated their work-life balance as “neutral” increased over the course of the project.

Figure 28. Work-Life Balance



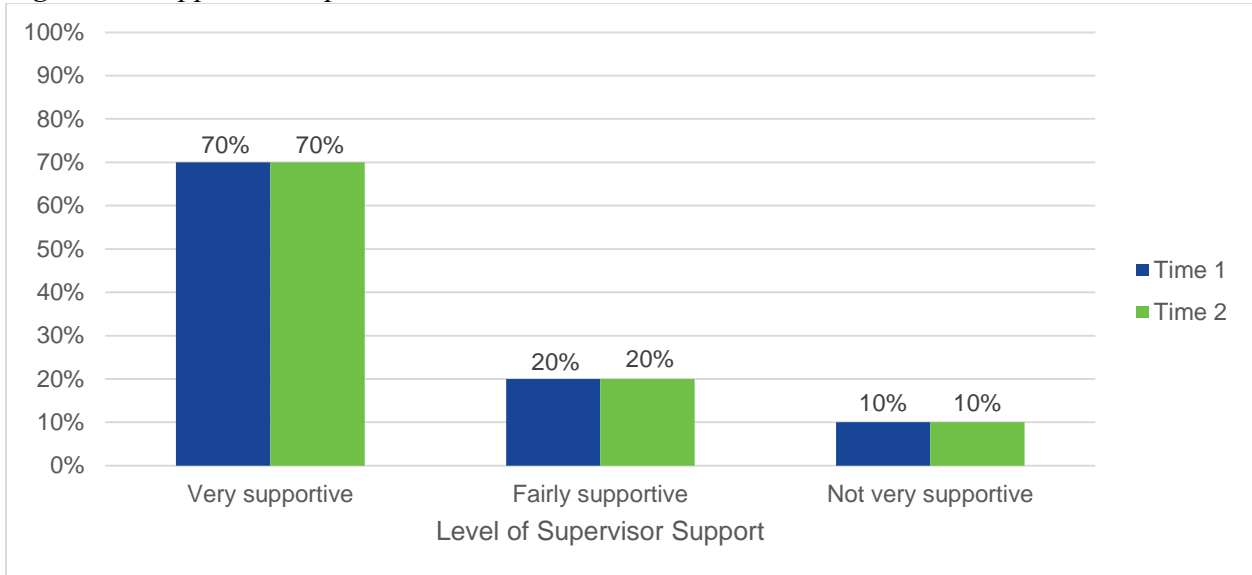
Note. $n = 20$.

Supportive Supervision

Employees were asked, “How supportive is your immediate supervisor? When thinking about ‘support’, think about whether your supervisor backs you up, provides you with the tools you need to do your job well, is fair and equitable, and/or caring about your personal well-being.”

As illustrated in Figure 29, the majority of employees felt that their immediate supervisor was “very supportive”. No employees rated their immediate supervisor as “not supportive at all”. There was no change in levels of supportive supervision from Time 1 to Time 2.

Figure 29. Supportive Supervision



Note. n = 20.

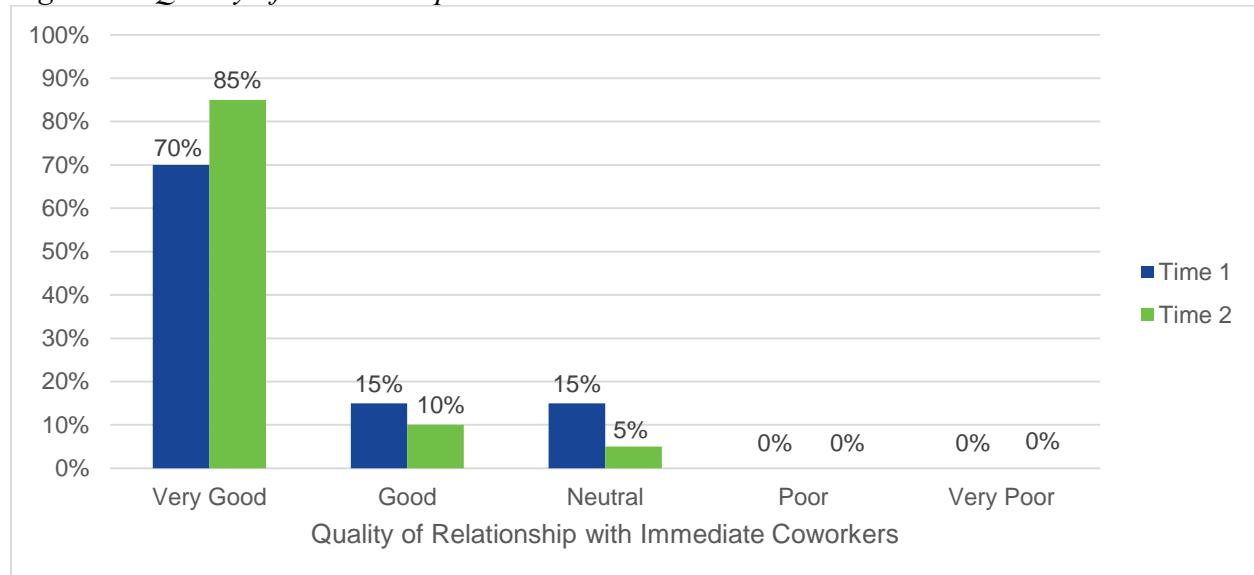
Teams

One theme that emerged during the logic modeling session was that of a sense of a division between the two office locations. The psychosocial interventions were put in place partially to address this division, and were designed to bring the two offices together.

To assess this on the survey, participants were first asked, “In general, how would you rate your relationship with your immediate coworkers--the ones that you interact with on a weekly (or more frequent) basis?” Next, participants were asked, “In general, how would you rate your relationship with the other staff members throughout CVEP (the entire staff)?”

As illustrated in Figure 30, most CVEP participants felt that they “are a great team” with their immediate coworkers, even at the needs assessment stage. No participants felt that they had a poor relationship with their immediate coworkers. The quality of relationships increased over the course of the workplace wellness program—at the program evaluation, 85% of participants felt that they had a very good relationship with their immediate coworkers.

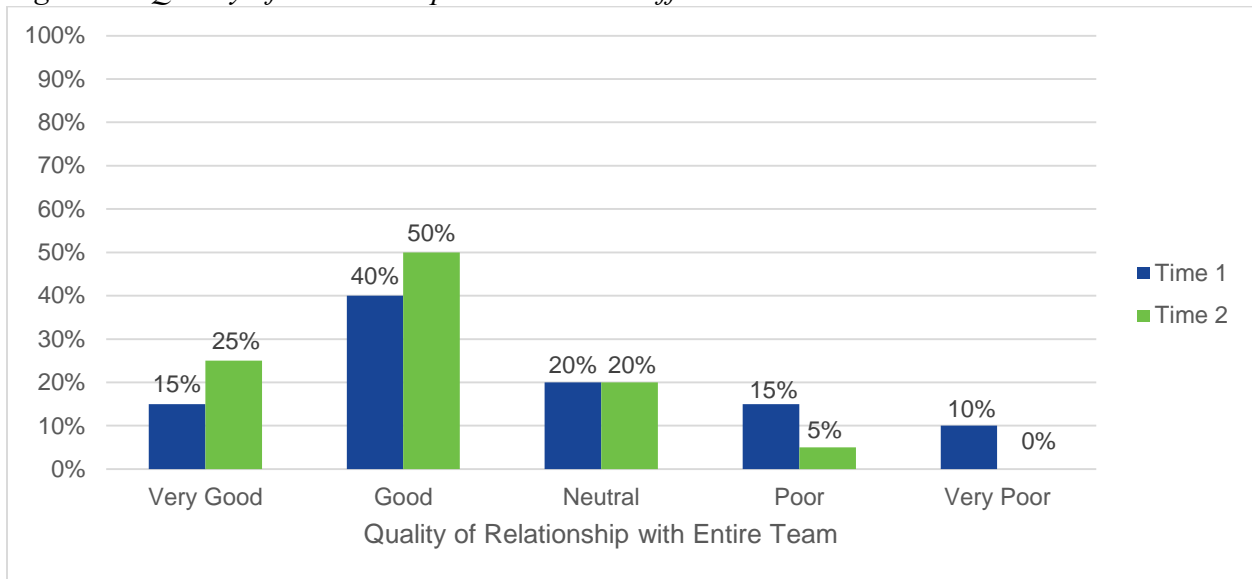
Figure 30. Quality of Relationships with Immediate Coworkers



Note. $n = 20$.

Relationships with the entire staff were less positive, as illustrated in Figure 31. Staff-wide relationships did improve over the course of the workplace wellness project—at the time of the program evaluation, 75% of participants felt that their relationship with the entire staff was at least good. Additionally, no participants felt that relationships were very poor after the workplace wellness program concluded. However, there is still progress to be made in organization-wide relationships.

Figure 31. Quality of Relationships with Entire Staff



Note. n = 20.

Upper Management-Level Interventions

The psychosocial work environment interventions were primarily targeted at the Employee Leadership Committee (ELC), representing the upper-level management of both offices. The interventions were conducted by Ms. Claudell Greear-Maggio.

ELC participants were asked, “Have you made any changes to the way you work as a result of what you learned at the sessions with Claudell?”. Responses indicated that behaviors did change as a result of these sessions. For example, ELC participants reported making efforts to be more positive and less blunt, to stop negative gossip, and to focus on communication and problem-solving.

All members of the ELC believed that the sessions with Ms. Greear-Maggio improved their management skills. Specifically, four participants felt that their management skills were “somewhat improved” as a result of the sessions, and two participants felt that their management skills were “greatly improved” as a result of the sessions.

All members of the ELC believe that the sessions with Ms. Greear-Maggio helped to bring the two offices together as a single team. Five of the participants felt that the sessions helped bring them together “a great deal”, and the sixth participant felt that the sessions helped “a little”. All six members of the ELC believed that communication at CVEP has improved since their work with Ms. Greear-Maggio.

Open-ended responses indicated that the ELC believed that the sessions with Ms. Greear-Maggio were extremely useful, and helped them to develop common goals, a shared vision, and a greater understanding of each office’s contribution to the mission. Overall, it improved their communication and dispelled myths and negative perceptions.

As a part of their intervention, each member of the ELC job shadowed at least one person from the other office. Reactions to this exercise were positive; participants indicated that they gained a greater understanding of their coworkers’ roles, expertise, and responsibilities.

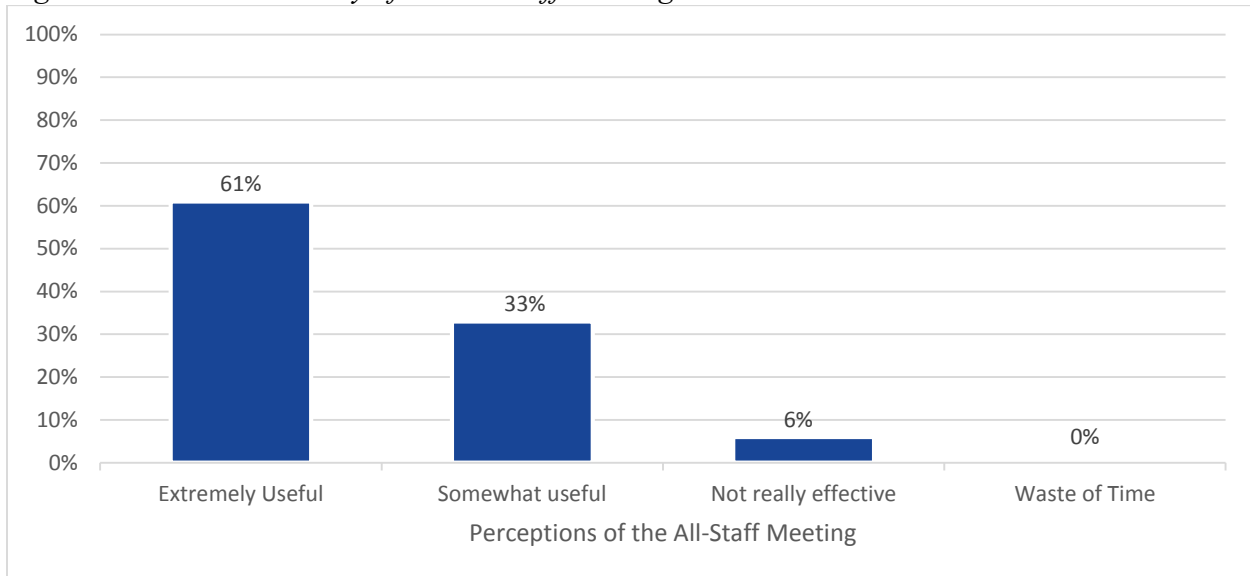
Thus, the psychosocial interventions with the ELC seemed to be extremely well-received, and produced positive outcomes.

Organization-Wide Interventions

The All-Staff Meeting in October 2014 was the ELC’s way to bring the lessons they had learned from the interventions with Ms. Greear-Maggio to the rest of the staff.

When asked, “What did you think of the All-Staff Meeting?”, most participants found it to be useful. As illustrated in Figure 31, a small proportion of participants felt that the All-Staff Meeting was “A nice thought, but not really effective”.

Figure 32. Perceived Utility of the All-Staff Meeting



Note. n = 20.

Participants were asked to reflect on how the All-Staff Meeting was a positive experience. Many responses indicated that getting to know their co-workers was a major positive aspect of this meeting. Additionally, the “fun” aspect of the program was greatly appreciated by many.

Another benefit of the All-Staff Meeting—one that directly pertains to the organizational needs—was the benefit of seeing a united leadership team. Seeing a united front seemed to boost morale for the staff members.

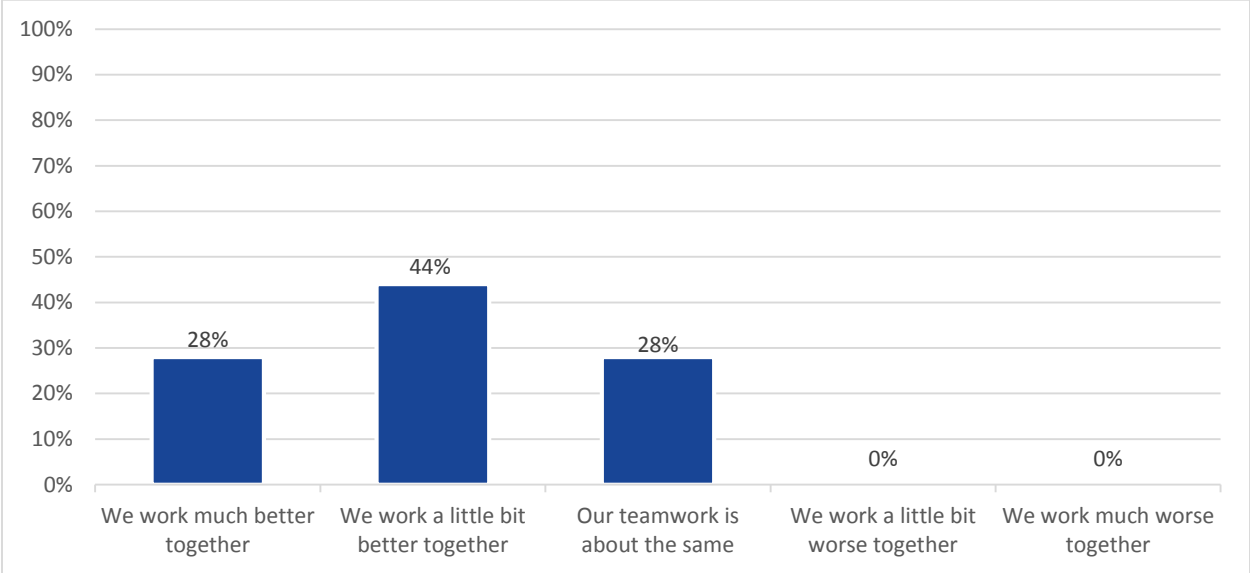
Based on this feedback, CVEP should build on this momentum and continue to provide activities that facilitate staff members getting to know one another in a fun environment. Regular All-Staff Meetings such as this one will likely assist with this, and help to model the “one company” (as versus “two offices”) concept for staff members. As one participant mentioned, “I’d like to see us continue these kinds of meetings quarterly”.

When asked to reflect on the negative aspects of the All-Staff Meeting, many participants indicated that they did not believe there were negative aspects of the event.

Others indicated that it would be useful to balance the team-building exercises with additional practical content. Thus, future meetings should incorporate additional segments such as company updates, clarifying organizational expectations, and upcoming events/issues.

Participants were also asked, “Please indicate which of the following statements best describes your feelings about your relationships with other staff members after the all-staff meeting.” As illustrated in Figure 33, the majority felt that they worked better together after the meeting.

Figure 33. Level of Teamwork Post-Intervention



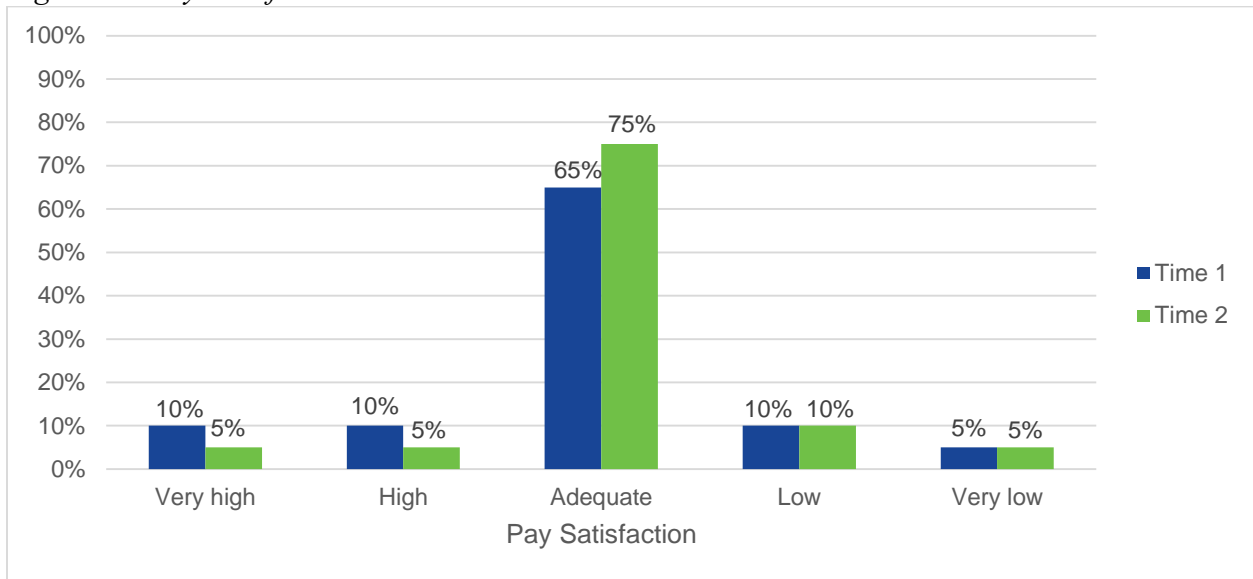
Note. n = 20.

Work-Related Resources

Pay

When asked, “How would you rate your satisfaction with your current pay level?”, the majority of CVEP participants considered it “adequate”. Approximately an equal number considered their pay high as those who considered it low, as illustrated in Figure 33. Satisfaction with pay did not change much between Time 1 and Time 2.

Figure 34. Pay Satisfaction



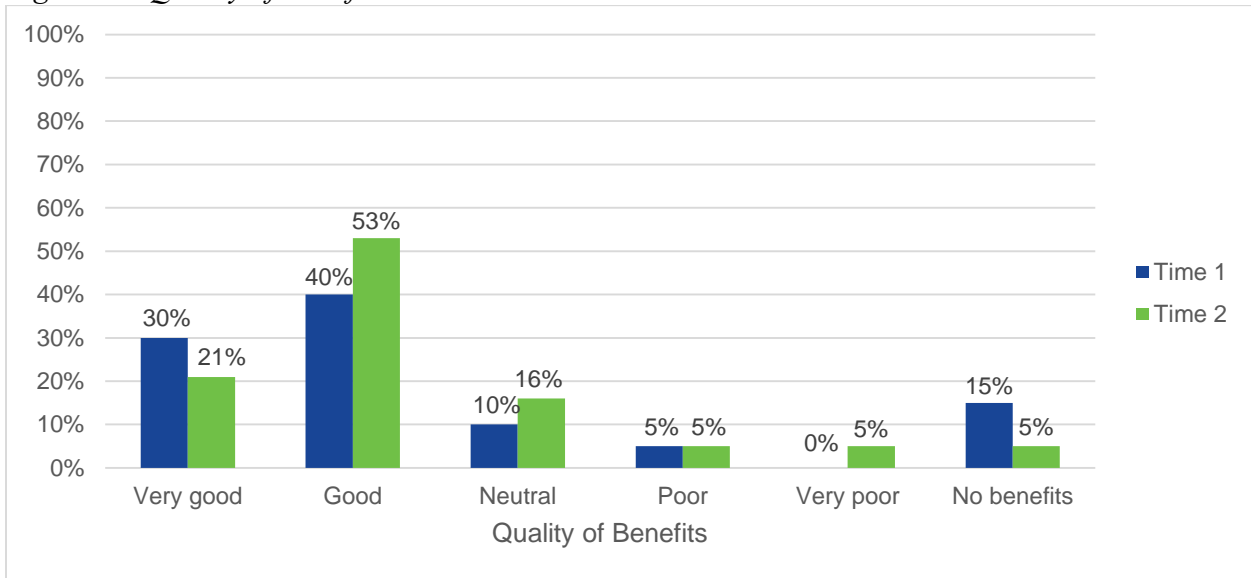
Note. $n = 20$.

Benefits

Participants were asked, “How would you rate the benefits that CVEP provides for you? ‘Benefits’ includes health insurance, 401k plans, and other employer-provided benefits.”

As illustrated in Figure 35, most participants believed that their benefits were “good” or “very good” at both time points. Perceptions about benefit quality did not change much from Time 1 to Time 2.

Figure 35. Quality of Benefits



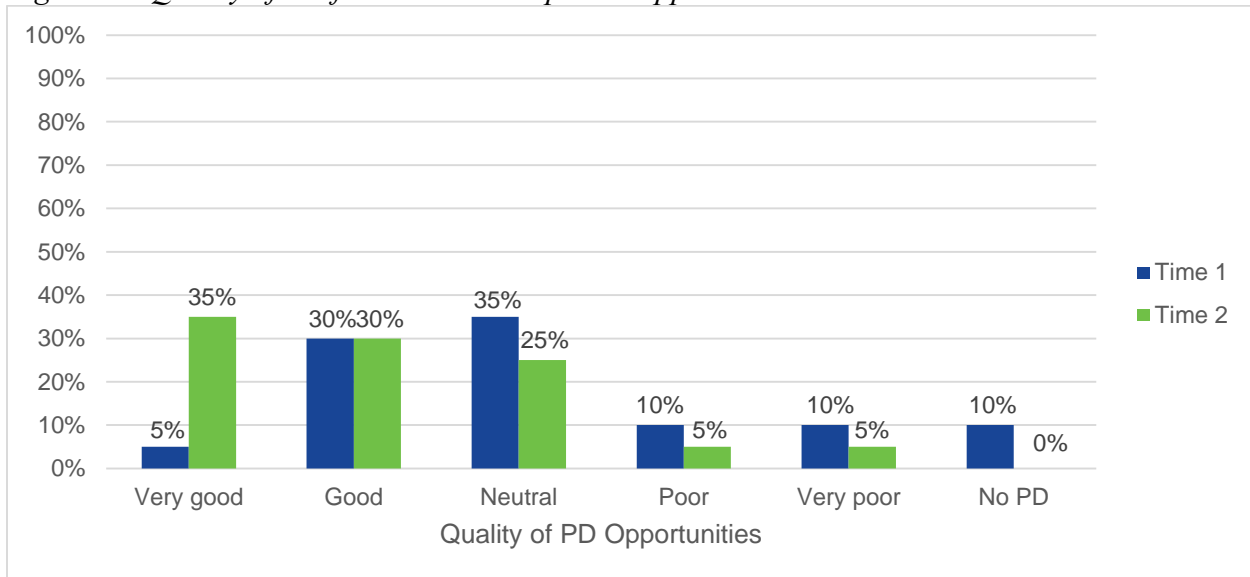
Note. n = 20.

Professional Development

Participants were asked, “How would you rate the development opportunities that CVEP provides for you? ‘Development opportunities’ include trainings, workshops, or other opportunities to develop your existing skills, teach you new skills, or make you more marketable as an employee.”

As illustrated in Figure 36, the number of participants who rated their PD opportunities as “very good” increased sharply throughout the course of the workplace wellness program. Over half of participants rated their PD opportunities as at least “good” at Time 2.

Figure 36. Quality of Professional Development Opportunities



Note. $n = 20$.

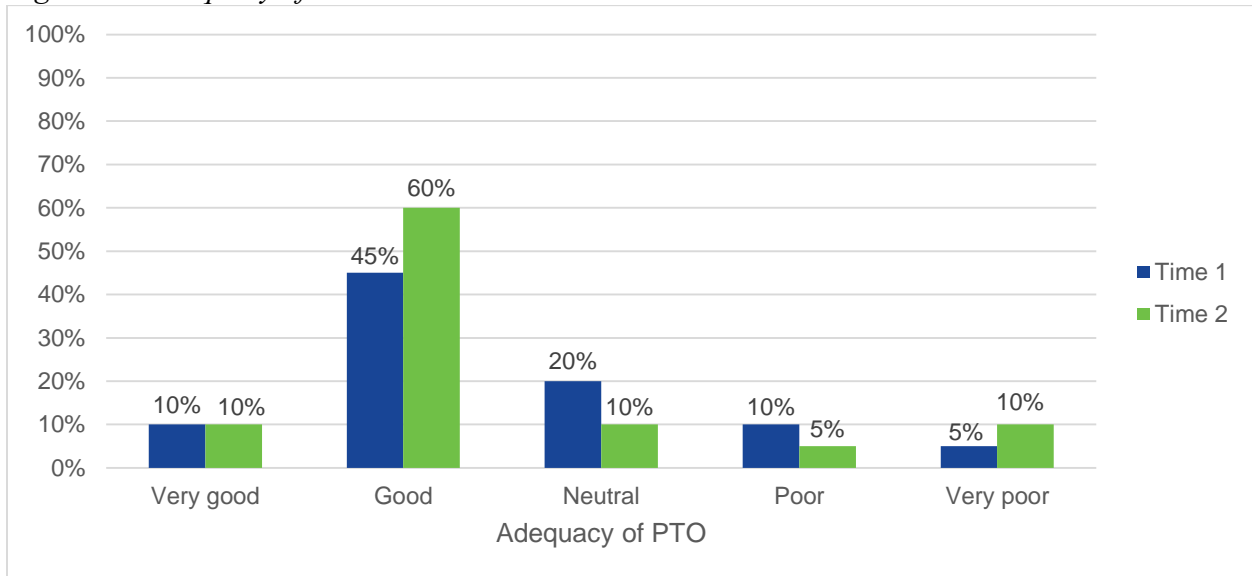
Participants were asked, “What, if any, types of professional development training would you like to have CVEP provide for you in the future?” Responses included conflict resolution, grants management/reporting, leadership development, and nonprofit management. However, as was noted in the needs assessment, several participants noted that while development opportunities were available, there simply was not enough time to take advantage of these activities. Thus, HARC once again suggests that CVEP put policies in place to ensure that employees are able to take advantage of at least one professional development opportunity per year.

Paid Time Off

Participants were asked, “How would you rate the paid time off (PTO) package CVEP provides for you? ‘PTO’ includes vacation, holidays, and sick leave.”

As illustrated in Figure 37, 70% of participants found their PTO to be at least “good”, which was a slight increase from Time 1. About 15% of participants feel that they need additional PTO days to meet their needs.

Figure 37. Adequacy of PTO



Note. n = 20

Work-Related Resources Interventions

There was relatively little change in participant perceptions of work-related resources between the needs assessment and the program evaluation. This is likely due to the fact that CVEP elected to not specifically focus on this area as a part of the workplace wellness project. The increase in quality of professional development is encouraging, and CVEP should continue to offer this to ensure that they are able to attract and retain top talent.

Organizational Change

When asked, “Do you think your work environment has changed over the past 6 months?” the majority of participants ($n = 12$) felt that the work environment was better than it was six months prior. Open-ended responses resonated with this.

In contrast, 8 participants felt that the work environment had not changed in the past six months. As one participant stated, “I just didn’t notice anything has changed.” Thankfully, no participants felt that the work environment had negatively changed over the past six months.

However, even for participants who felt that positive change had occurred, there was some concern that this would not produce lasting change going forward. Thus, it is clear that in order to have a lasting impact, CVEP must continue to work with the employees, improve communication, and reduce conflict in order to maintain the team relationships.

Several employees questioned the decision to conduct the bulk of the psychosocial interventions with only the six members of the ELC. Several participants felt that the program would have had a greater impact if the entire staff had been involved. Thus, HARC encourages CVEP to extend future psychosocial interventions—such as the sessions with Ms. Claudell Greear-Maggio—to the entire staff. This will ensure that the messages are not diluted by passing through many steps, and that the entire staff feels included, valued, and important. These are all critical components to a highly functioning team. Finally, it is worth noting that some participants felt there were deep-seated issues that were not impacted by the interventions, and that are a barrier to true team cohesiveness.

Thus, it is clear that the lack of accountability remains an issue that needs to be addressed, as does the divide between the two offices. CVEP has already begun to address the accountability issue by hiring Ms. Greear-Maggio as an HR consultant. This positive forward action must continue, and ideally, as finances allow, an in-house HR staff member should be developed.

As for the divide between the two offices, the team-building efforts need to not cease simply because the workplace wellness project has concluded. Regular All-Staff Meetings are planned, and should continue to happen. Additional leadership training from Ms. Greear-Maggio should be undertaken, if at all possible, and employees should be encouraged to continue with the “get to know each other” lunches and coffee breaks. A cohesive team is an on-going process, not an end destination, and CVEP must continue to build upon the progress made through this project.

The issue of the geographic and philosophical divide between the two offices is something that should be brought to the Board of Directors for consideration.

Program Evaluation Conclusion

Overall, the workplace wellness program had a positive impact. Outcomes improved in several areas, most notably general health and psychosocial work environment. It is important for CVEP to build on these successes going forward.

Physical Work Environment

There were no substantial improvements made in terms of physical work environment. Several employees did get an ergonomic assessment as a part of the intervention, and were able to fix some minor issues in their workspaces. However, to implement all suggestions made during the ergonomic assessment, these employees need CVEP to purchase new equipment. Until this new equipment is purchased, ergonomics and general comfort at work is unlikely to improve. Thus, HARC encourages CVEP to provide the employees with the recommended equipment.

Psychosocial Work Environment

Participants reported a slight reduction in work overload over the course of the workplace wellness project, and all participants now feel that they have at least some of the tools they need to do their job. Levels of job clarity and job control improved from Time 1 to Time 2. Most notably, the quality of relationships with immediate coworkers and the broader staff both improved over the course of the workplace wellness program.

Feedback from participants indicated that the psychosocial interventions were enjoyable and productive. These interventions resulted in improvements in communication, greater respect and understanding, and a more cohesive team. Thus, HARC encourages CVEP to build on the momentum and continue to work together with Ms. Greear-Maggio. Hopefully, continued work will result in a stronger team with even better communication. Regular All-Staff Meetings should be held to bring the offices together. These meetings should include not only team-building exercises, but also updates on operations, clarification of policies, skill-building, and general updates.

Additionally, in another role, Ms. Greear-Maggio will be providing Human Resources consulting to CVEP in the future, which will hopefully continue to address concerns about inconsistent policies, favoritism, and lack of accountability. If possible, CVEP should consider hiring an in-house HR manager to ensure that this does not lapse.

There are some concerns that these positive changes will not be long-lasting. To ensure this does not happen, CVEP must continue to build upon the activities that have been conducted as a part of the workplace wellness program, and sustain these activities. Team relations, accountability, and communication remain critically important issues to CVEP employees. Maintaining current levels—and improving from them—will require on-going, conscious efforts on CVEP's part.

Additionally, there remain some significant concerns about the divide between the two offices—both in terms of geography and in terms of philosophy. This is an issue that should be address at the Board level, as it will likely require major changes to address.

Work-Related Resources

There was very little change in perceptions of the quality of work-related resources such as pay, benefits, and paid time off. This is likely due to the fact that CVEP chose to focus on the physical and psychosocial work environment interventions. However, perceptions of the quality of professional development did improve—possibly because the psychosocial interventions were perceived as professional development (e.g., leadership training). In order to attract and retain top talent, CVEP should continue to offer these levels of work-related resources as a minimum, and work to improve employees’ ability to actually participate in professional development activities. HARC recommends a formal policy as a potential measure to ensure that employees feel able to take advantage of professional development opportunities.

PILOT PROJECT CONCLUSION

From HARC's perspective, the pilot workplace wellness project was a success. Each aspect of the proposed services (i.e., logic modeling, needs assessment, intervention, and program evaluation) were completed in partnership with CVEP, and results indicate that the interventions did help to improve the work environment at CVEP. As a pilot project, HARC experienced several challenges, and gained useful information that can be used to adapt the workplace wellness program in the future, as well as to market these services.

Challenges, Lessons Learned, and Future Changes

HARC experienced several challenges, and learned several important lessons that will be applied to the next workplace wellness project.

Challenge: Unique Outcome Measures

Many organizations who undertake a workplace wellness program have fairly standard organizational outcomes they would like to see improve; these typically include reducing absenteeism, increasing productivity, reducing turnover, and lowering healthcare and/or legal costs associated with employee illness. It is often very compelling to organizations to measure outcomes in terms of dollars saved due to these improved outcomes.

From the very first initial meeting with CVEP, the leadership staff made it clear that these outcomes were not problematic at CVEP, and were not the outcomes they were interested in improving. Through logic modeling, CVEP leadership did identify other outcomes of interest to them (enhancing employees' understanding of how their role aligns with CVEP's overall purpose, and to increase role clarity, maximize internal resources, eliminate redundancies, and reduce workload). However, these outcomes were more qualitative than the traditional quantitative organizational outcomes, and thus, subject to more uncertainty regarding whether the goals were reached. Additionally, these organizational outcomes may not generalize to other organizations easily, and thus, it may be more difficult than anticipated to draw parallels between the pilot project (i.e., work sample) and a potential client's organization. Thus, HARC will need to undertake additional work to ensure that the pilot project materials truly speak to other potential clients who may be interested in the traditional organizational outcomes.

Lesson Learned: Increased Communication

For the next project, HARC will engage in a steady stream of communication so that employees feel more connected to the program. As one participant noted, "Somehow, and I think this may be my fault, it seemed like there was a lot of activity at the beginning, and then I really didn't know what happened with the project. At one point I thought it was actually over when it wasn't. Perhaps there could be a blog, emails, or a newsletter about the progress." To avoid this, HARC's next project will include regular updates for employees, and multiple channels through which employees can interact with HARC and the concept of workplace wellness. The suggestion of a blog and/or a newsletter is an excellent one, and will be seriously considered in the next workplace wellness implementation.

Lesson Learned: Organization-Wide Inclusion

The majority of the work done with Ms. Greear-Maggio was done with six employees in upper management. Open-ended comments made it clear that team cohesion and overall relationships would likely have been improved if these interventions had included all staff. Thus, in future efforts, HARC will strongly recommend that all interventions be inclusive of all staff.

Marketing and Branding HARC's Workplace Wellness Services

When HARC initially approached CVEP about partnering on a “workplace wellness” program, CVEP leadership mistakenly believed that this would be a weight loss program, nutrition program, or similar program dedicated to changing physical health for employees. This is a common mistake. Ideally, HARC would like to have a name for this service that better describes what organizations can expect to go through. Thus, to solicit potential terms for this process, the participants were asked for their input during the program evaluation:

“This project was a pilot project conducted by HARC to improve workplace wellness. The project included meeting with your leadership, presenting at the All-Staff Meeting, conducting an online needs assessment, making recommendations for action to address those needs, providing ergonomic assessments, and providing training to your senior leadership to increase team collaboration and create consistent policies and practices throughout the organization. We called this ‘workplace wellness’. From your perspective as someone who went through the process, is there a better name? What would YOU call this project?”

Responses indicated that many participants felt that “workplace wellness” was an appropriate name for the program. For example:

- “I like the name ‘workplace wellness’”
- “I think the name is good and emphasizes the purpose of the assessment.”
- “I think Workplace Wellness is probably the best term to use, though it will still require some level of explanation. There will always be a stereotype associated with the term but it really is a holistic view of the work environment.”

Other participants had additional suggestions, including:

- “I wish there were a work other than ‘wellness’ that is less ‘health’ sounding. Need a more holistic word, wholeness, well-being?”
- “Wellness to me means personal health. I think extending that meaning to the workplace is difficult to transfer effectively”
- “Workplace Communication and Team Building”
- “Workplace Improvement Strategies”
- “Workplace Satisfaction Assessment”
- “Workplace Synergy”
- “Well-being in the workplace”
- “Health, Productive Workplace”

One of the important aspects of conducting this pilot project was being able to provide a work sample and testimonials to potential clients in the future. Many employees of CVEP made comments that can easily be used for marketing the program to other organizations. Examples of these testimonials include:

- “I am so appreciative for this project -- it has, without question, improved the workplace wellness for CVEP. Forming the senior leadership team and providing senior leadership team retreat was the single BEST thing that CVEP has done in the 10 years that I've been connected to this organization and it is yielding very positive outcome/results. The facilitated, frank conversation among the leadership team has allowed real resolutions to stubborn issues.”
- “It was a great project and experience. I would recommend it to other organizations.”
- “The work environment at CVEP has changed significantly after our HARC retreats. I am confident that this experience will help strengthen CVEP as an organization”

Next Steps

The information gathered from this pilot project will be used to refine and revise the workplace wellness services, and to inform the marketing of these services. In collaboration with HARC’s marketing consultant, HARC plans to seek out funding for a full-scale marketing plan for these services. By aggressively marketing these services, HARC hopes to attract new clients and be able to provide these important services to more employees across the Coachella Valley, especially those in low income jobs and/or living in the East Valley.

Additionally, HARC is currently collaborating with Dr. Bruce Underwood on a potential workplace wellness partnership. Dr. Underwood has leads on a private funder that may be interested in funding a workplace wellness needs assessment, intervention, and program evaluation for one of the nine cities in the Coachella Valley. Dr. Underwood would likely provide some of the intervention services, while HARC would lead on the needs assessment and program evaluation portions of the project. Hopefully this project will come to fruition, bringing workplace wellness to many residents of the Coachella Valley.

In sum, this is a promising launch to HARC’s workplace wellness services, which will hopefully improve the health of workers and organizations alike in the near future.

APPENDICES

Appendix A: CVEP Logic Model

Appendix B: Needs Assessment Survey

Appendix C: Psychosocial Work Environment Intervention Summary

Appendix D: Program Evaluation Survey for Leadership

Appendix E: Program Evaluation Survey for Staff

Appendix A: CVEP Logic Model

CVEP Upper Management Goals for the Workplace Wellness Program Last updated 3/31/14 by JRLH

Goal	Purpose	Strategies to Achieve the Goal	Tasks to Accomplish Strategies	
1	Develop clear, concise, measurable organizational goals and communicate these to all employees.	To enhance employees' understanding of how their individual role aligns with CVEP's overall purpose.	a Identify clear, concise, measurable organizational goals for CVEP.	With the assistance of a facilitator, managers create a comprehensive, agreed-upon list of clear, concise, measurable organizational goals using the following documents as a starting place: 1) Workforce Development's Regional Plan, 2) CVEP's Business Plan, 3) CVEP's Blueprint, and 4) the results of the 4DX training.
			b Explicitly identify how each employee's job contributes to one or more of the organizational goals.	
			c Communicate CVEP goals to all employees.	
2	Communicate employee job descriptions and individual skills throughout the organization.	To eliminate redundancies, maximize internal resources, reduce workload, and increase role clarity.	a Ensure that each employee has job clarity about their own role and job.	Managers review job descriptions with employees, discuss any remaining ambiguities. CVEP provides job training to employees who lack the knowledge, skills, or abilities to perform some aspects of their jobs.
			b Communicate employee roles and skills to everyone in the organization.	Share job descriptions, roles, and skills at a staff meeting. Create/update a detailed organizational chart that includes not only individual names and titles, but also basic job functions and areas of expertise. Create a policy/process where the above two tasks are regularly revised/updated.
			c Explore the possibility of implementing an employee portal for CVEP.	CVEP staff who have used Alignment introduce the portal to upper management, do a training on the tool.

Appendix B: Needs Assessment Survey

Needs Assessment Page 1: Introduction

This survey is designed to assess your satisfaction with your work environment and how it could be improved. The results will be used to recommend changes to the workplace that will make CVEP employees healthier and happier.

This survey should take you between 15 to 20 minutes to complete. You can take the survey during your normal workday--you will be paid for that time and do not need to consider it a break time. Please be as detailed as possible in your responses--this will help us design targeted programs and services to meet your needs!

Everything you say on this survey will be kept completely confidential. At no time will your supervisor or any of your coworkers get to see your responses. Only the researchers at HARC will be able to see your individual responses.

If you have any questions or concerns, please contact Dr. Jenna LeComte-Hinely at HARC:
jlecomte-hinely@HARCdata.org
760-404-1945

Please click "next" to start the survey!

Needs Assessment Page 2: About You

1. Please fill out some details about yourself. This will ONLY be seen by HARC staff; your individual responses will never be reported to anyone at CVEP.

- First Name:
- Last Name:

2. What CVEP site or location do you work at for the MAJORITY of the time?

- Main office (Tahquitz Canyon Way, Palm Springs)
- Workforce Excellence office (Dinah Shore Drive, Palm Desert)
- Other site (please specify)

3. How many hours do you typically work for CVEP each week?

Needs Assessment Page 3: Health

4. Would you say, in general, that your health is...

- Excellent
- Very good
- Good
- Fair
- Poor

5. How would you rate your PHYSICAL health?

- Excellent
- Very good
- Good
- Fair
- Poor

6. How would you rate your MENTAL health?

- Excellent
- Very good
- Good
- Fair
- Poor

Needs Assessment Page 4: Working at CVEP

7. What is your favorite thing about working at CVEP?

8. What is your LEAST favorite thing about working at CVEP?

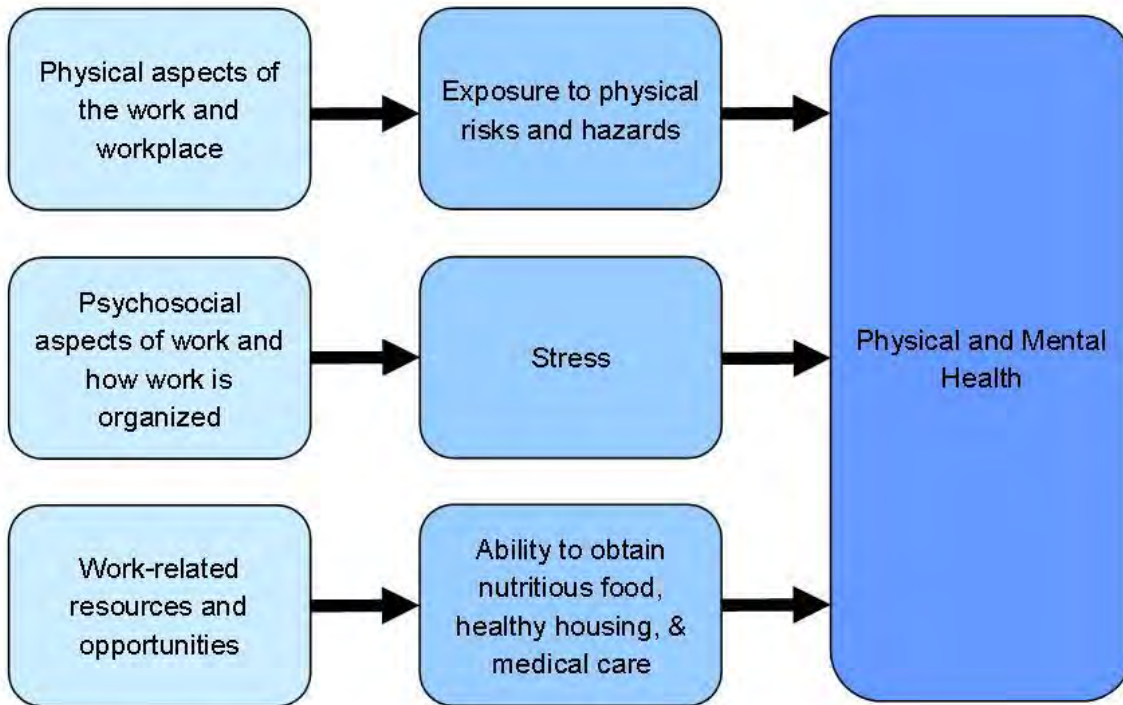
9. If you could change any CVEP policy, rule, or regulation to better meet your needs, what would that change be?

Needs Assessment Page 5: Three Aspects of Work

The next sections will focus on three areas of your work environment:

1. The PHYSICAL work environment
2. The PSYCHOSOCIAL work environment
3. The work-related RESOURCES your work provides for you

Each of these areas are an important part of how work impacts your health and wellness.



Source: Robert Wood Johnson Foundation

Needs Assessment Page 6: Physical Work Environment

10. Have you ever been injured while at working for CVEP?
- I have never been injured at work
 - I have had very minor injuries at work - things like paper cuts, bruises, etc.
 - I have had moderate injuries at work - things like sprains, strains, more serious cuts, etc.
 - I have had serious injuries at work that required a trip to a doctor, time off work, and/or workers' comp
11. How much do you worry about being injured during your regular work for CVEP?
- I almost never worry about being hurt at work
 - I rarely worry about being hurt at work
 - I sometimes worry about being hurt at work
 - I frequently worry about being hurt at work
12. How physically comfortable are you at work?
- I am very comfortable
 - I am somewhat comfortable
 - I am not really comfortable or uncomfortable
 - I am somewhat uncomfortable
 - I am really uncomfortable
13. How would you rate your ergonomics experience in your day-to-day work environment?
- Very good - I almost never have any aches, pains, or strains from work
 - Good - I have aches, pains, or strains resulting from my work once a month or less
 - Neither - I'm not really sure whether or not work is causing me aches, pains, or strains
 - Poor - I have aches, pains, or strains resulting from my work at least once a week
 - Very poor - I feel aches, pains, or strains from work every day
14. If you could change ANYTHING to make your physical work environment better for you personally, what change (or changes) would you make?

Needs Assessment Page 7: Psychosocial Work Environment

15. How would you rate your current workload?

- Really overloaded - I have way too much work
- A little too heavy - I have a bit too much work for me to handle
- Just right - I have enough work to keep me busy but not too much
- A little too light - Sometimes I run out of things to do
- Not enough - I am often bored or don't have enough to do

16. Do you feel that you have the tools you need to get your work done? When thinking about "tools", think about whether you have the skills, programs/software, staffing capabilities, or other resources that can help you to do your job effectively and efficiently.

- I have all the tools I need to do my work
- I have some of the tools I need to do my work, but others would be helpful
- I don't have the tools I need to do my work effectively and efficiently

17. "Job clarity" is the level of understanding you have about what you need to do each day at work in order to really excel at your job and help CVEP succeed. How would you rate your level of job clarity?

- Very strong - I know exactly what I need to do each day
- Strong - I know what I need to do in general
- Neither strong nor weak
- Weak - I know overall what I should do, but I don't know what actions to take to get there
- Very weak - I am very confused about what I should be doing

18. "Job control" is the extent to which you have control over how your work gets done--you get to make decisions about which tasks have priority, how you will accomplish those tasks, and when those tasks get done. How would you rate your level of job control?

- Very strong - I am in complete control of how I get things done
- Strong
- Neither strong nor weak
- Weak
- Very weak - I have no control over how I work

Needs Assessment Page 8: Psychosocial Work Environment

19. "Work-life balance" is when your work is flexible enough for you to easily meet both your work needs and your needs outside of work (like taking care of kids or parents, managing your household, and seeing healthcare providers when you need it). How would you rate your work-life balance?

- Very good
- Good
- Neutral
- Poor
- Very poor

20. In general, how would you rate your relationship with your immediate coworkers--the ones that you interact with on a weekly (or more frequent) basis?

- Very good - We are a great team
- Good
- Neutral
- Poor
- Very poor - We do not work well together as a team

21. In general, how would you rate your relationship with the other staff members throughout CVEP (the entire staff)?

- Very good - We are a great team
- Good
- Neutral
- Poor
- Very poor - We do not work well together as a team

22. How supportive is your immediate supervisor? When thinking about "support", think about whether your supervisor backs you up, provides you with the tools you need to do your job well, is fair and equitable, and/or caring about your personal well-being.

- Very supportive
- Fairly supportive
- Not very supportive
- Not supportive at all

23. If you could change ANYTHING to make your psychosocial work environment better for you personally, what change (or changes) would you make?

Needs Assessment Page 9: Work-Related Resources and Opportunities

24. How would you rate your satisfaction with your current pay level?

- Very high
- High
- Adequate
- Low
- Very low

25. How would you rate the benefits that CVEP provides for you? "Benefits" includes health insurance, 401k plans, and other employer-provided benefits.

- Very good
- Good
- Neutral
- Poor
- Very poor
- CVEP does not provide employee benefits for me

26. How would you rate the paid time off (PTO) package CVEP provides for you? "PTO" includes vacation, holidays, and sick leave.

- Very good - I have more PTO days than I need
- Good - I have plenty of PTO days to meet my needs/wants
- Neutral
- Poor - I need/want some more PTO days than I currently have
- Very poor - I need/want many more PTO days than I currently have
- CVEP does not provide me with any PTO

27. How would you rate the development opportunities that CVEP provides for you? "Development opportunities" include trainings, workshops, or other opportunities to develop your existing skills, teach you new skills, or make you more marketable as an employee.

- Very good
- Good
- Neutral
- Poor
- Very poor
- CVEP does not provide me with any development opportunities

28. If you could change ANYTHING to make your compensation, benefits, or other work-related "perks" better for you personally, what change (or changes) would you make?

Needs Assessment Page 10: Anything Else?

29. Is there anything else you think that we should know in order to really understand your work-related needs and wants?

30. Is there anything else that you think we should know about your health?

Needs Assessment Page 11: Thank You

Thank you for completing this survey! If you have any other feedback, questions, or concerns about this survey or the wellness program, please contact HARC's Director of Research and Evaluation, Dr. Jenna LeComte-Hinely, at jlecomte-hinely@HARCdata.org or by phone at 760-404-1945.

Appendix C: Psychosocial Work Environment Intervention Summary

Executive Summary

CVEP – Team Building

Submitted to Health Assessment Resource Center

October 17, 2014

Report completed by: Claudell Greear-

Maggio PHR, CEO



Introduction

On or around August 1, 2014 Greear Consultant Group, LLC (GCG) was contacted via phone by Lesa Bodnar, Director of Administration and Facilities for the Coachella Valley Economic Partnership (CVEP). Ms. Bodner was requesting trainings for the Employee Leadership Council (ELC) and HR infrastructure assistance; this request was based on findings from an assessment conducted by: Health Assessment Resource Center (HARC, Inc.) on or around December 2013.

The HARC assessment provided CVEP with a comprehensive suite of services, including assessing workplace wellness needs, designing and implementing interventions to address those needs, and evaluating the efficacy of the intervention.

The report made several recommendations to improve work conditions and efficiencies at CVEP. This included:

1. Develop clear, concise, measurable organizational goals and communicate these to all employees.
2. Communicate employee job descriptions and individual skills throughout the organization.

To address these goals, HARC recommended:

- A. Hiring a facilitator to work with upper management to identify clear, concise, measurable organizational goals for CVEP in support of Goal 1. These goals would be elaborated in a variety of formats, and shared with all staff in writing and orally.
- B. Hiring a facilitator to work with employees to create a detailed organizational chart, and to share this chart widely throughout the organization in writing and orally.
Additionally, HARC recommended adopting a formal policy specifying that the chart is to be updated upon hiring of new full-time staff members, and that the policy should specify who is responsible for updating the organizational chart.

In regards to psychosocial aspects of work, workload is a major source of stress: many employees feel that they have an extremely heavy workload. Job control, job clarity, and work-life balance are all strong at CVEP; employees have the control and flexibility they need to be successful both at work and outside of work. However, team relations are somewhat strained between the two offices, and while immediate supervisors are considered very supportive, there is a divide between upper management and lower-level employees. Additionally, considerable stress stems from a lack of consistent, fair application of policies across the workforce, as well as a lack of accountability.

To address the psychosocial issues, HARC recommended:

- C. Engage in a team-building workshop that will help bring the two offices together and increase team cohesion throughout the organization.
- D. Adopt programs and policies that will help employees cope with stress in healthy ways, such as “Bring Your Dog to Work” day, work from home days, relaxation classes, or health programming.
- E. Senior management staff attend a workshop to hone management skill

GCG addressed items A, B, C and E.

Five Dysfunctions of Team Training

To address the issue of a team that is not functioning as a single cohesive unit, GCG utilized and facilitated the Five Dysfunctions of Team Training.

In his book, *The Five Dysfunctions of a Team: A Leadership Fable*, Patrick Lencioni describes common struggles of teams and how to resolve them. He demonstrates how successful teams require discipline, courage, and persistence to become effective and high-performing. He argues that functional, cohesive teams are the last competitive advantage available to any organization looking for a powerful point of differentiation. Successful teamwork is not about mastering subtle theories, but rather about embracing common sense with uncommon levels of discipline and persistence. By acknowledging the imperfections of humanity, members of functional teams overcome natural tendencies that make teamwork so elusive. The Five Dysfunctions are:



This training is recommended to be a two day off site seminar. Both Lesa and Tom Flavin, President, CEO of CVEP, felt that to require the ELC attend a two day training would create further friction, they were hopeful after the half day seminar the team would agree the value brought by the training was worth more of their time.

In the first meeting held off site the team worked on Absence of Trust, Fear of Conflict and Lack of Commitment. At the start of the training they considered their teams to be the people they work with directly not the ELC sitting at the table. In addition they identified the disconnect that had been growing as a direct result of them never meeting face to face to discuss issues or understand better how each department supports the global mission of CVEP.

They identified this lack of communication with other as a missing crucial block to the foundation and success of CVEP. They set a 30 day goal that each member of the ELC would job shadow the other managers to better understand how interdependent they really are.

Cascading Communication

In addition they agreed to specific cascading communication (a means of ensuring that a group of individuals clearly understand the corporate agenda and push it down to employees throughout the organization), that included the following;

- 1) In today's meeting, for the good of CVEP, the team prioritized actions, to respond to the findings of HARC and La Quinta
- 2) It was a very productive meeting
- 3) We will all share the 30 day goal
- 4) This time is different, we will follow thru, we will be deliberate and we need you (employees) to trust us

Below is the email Tom sent to his staff modeling the cascading communication behavior he expected from his ELC.

*Sent: Wednesday, August 27, 2014 8:35 AM
Subject: Employee Leadership Council*

To All Staff:

Following up two recent employee surveys conducted by HARC and LaPiana Consulting, I want to announce the formation of an employee Leadership Council to address workplace issues raised in those surveys. The members of the Leadership Council are: Sheila Thornton, Joe Wallace, Kim McNulty, Zeke Bonillas, Ernie Rios, Lesa Bodnar and me. We are being assisted by a Human Resources professional and had our first workshop session yesterday. I am pleased to report we had a very productive meeting and have made commitments to future meetings and follow through. You will be hearing more about this in the future and I encourage you to share your thoughts on this matter with any member of the Leadership Council. If you have any questions for me, I am available to discuss them....thank you for all your hard work."

Tom

They also agreed to complete the training in a day and ½ seminar off site, after the 30 day goal had been completed. They agreed to report back a summary of how each department supports the team.

They set a date for an all staff meeting, where they would communicate as a team to the staff regarding what direction CVEP was going, what role all they all play in the success and answer questions from the staff.

Retreat Summary

At the retreat conducted on September 29th and 30th 2014 in Temecula, each member of the ELC reported back 100% compliance with their 30 day goal and discussed their findings of how impressed they all were, with what the others bring to the table. In addition, Lesa, had bought all of them the book “Five Dysfunctions of a Team.”

The Five Dysfunctions of a Team training continued addressing the final dysfunctions, lack of accountability and inattention to results. During this process each member of the ELC engaged in activities that required truth and honesty with themselves and each other.

They used the afternoon of the first day to have honest frank discussions regarding issues they had with employees, with individual processes, past miscommunications or lack of communication and various other concerns and perceptions.

On the second day, the ELC set their thematic goal (the single most important thing tht the organization needs to focus on, right now. It is qualitative, temporary, and represents the rally cry for the entire organization).

“We will design and implement an efficient financial and human resource infrastructure that ensures our organizational excellence by June 1, 2015.”

They identified in order to be successful with their thematic goal they would need subject matter experts in the fields, of HR and finances. Specifically they identified they would need a Financial Consultant who is a subject matter expert in SAGE software. They defined their 10 month objectives in order to quantify their goal:

1. Compliance with all funding sources
2. Standardize expense reports
3. Respond to the findings of the HR Assessment conducted by GCG
4. Meet with Project Directors to identify their needs
5. Have the Executive Committee approve a policy for timely employee reviews that are consistent.

Before leaving the ELC scheduled monthly meetings through June 1, 2015 and two (2) additional meetings before the all-staff to ensure they were prepared to deliver a consistent message and vision to the staff.

Human Resource Assessment

Regional Access Project (RAP) utilizing the Technical Assistance Program (TAP) grant funded a complete HR assessment of the current administrative practices utilized by CVEP. The assessment was conducted by Claudell Greear-Maggio PHR and CEO of GCG.

The findings of the assessment along with recommendations were given to CVEP in writing on October 6, 2014. While there were several recommendations made that did not relate to the HARC evaluation, the job description recommendations were in line with HARC findings. To avoid miscommunication, confusion and mixed messages it was recommended by GCG that CVEP develop job descriptions that clearly define essential functions and chain of command.

The organizational chart as submitted to GCG is a functional chart. CVEP structure is set up so that each portion of the organization is grouped according to its purpose. The functional structure works very well for small businesses in which each department can rely on the talent and knowledge of its workers and support itself. However, one of the drawbacks to a functional structure is that the coordination and communication between departments can be restricted by the organizational boundaries of having the various departments working separately.

The way an organization is structured affects the ability to function efficiently. Determining and consistently communicating levels of authority, company values, goals, and objectives and being consistent are all very important for success.

The purpose of an organizational chart is to show the structure of an organization and the relationships and relative ranks of its parts and positions/jobs. Organizations are set up in specific ways to accomplish different goals, and the structure of an organization can help or hinder its progress toward accomplishing these goals. Organizations large and small can achieve higher sales and other profit by properly matching their needs with the structure they use to operate.

Once valid job descriptions are created and distributed, we can look at which type of organizational chart will best fit the needs and vision of CVEP. Other findings of the assessment included a lack of training being given to managers on key employment issues, some procedure deficits and opportunities for improving administrative processes.

All-Staff Meeting

On October 16, 2014 CVEP held their all staff meeting at the Agua Caliente Hotel, in Rancho Mirage. It should be noted the entire meeting was organized, and planned by members of the ELC.

The meeting began with individual staff members reading “Community Agreements”. These agreements are:

- Acknowledge one another as equals.
- Speak from your heart.
- Get what you need.
- Assume good will.
- Trust the process.
- Expect it to be messy at times.
- Watch your “your air time.”
- Be open to trying new things.
- Don’t be afraid to ask questions
- Commitment to leave the community better than you found it
- Participate
- Minimize distractions: cell phones

Next Donna Sturgeon, a CVEP employee who had gone through the ergonomics training provided by HARC, lead the team in stretching exercises that she had learned during the wellness training. Each staff member received a pamphlet explaining how to safely do the exercises. The ELC encouraged all staff to take a break and stretch every 20 to 30 minutes during their work day.

They then spent time on team building exercises beginning with the human billboard (someone who applies an advertisement on his or her person) activity. During this exercise all employees wrote on their billboard what they treasure, what they are the most proud of and what is on their bucket list.

All billboards were then displayed the staff walked the gallery. CVEP staff discovered many of them had the same items on their bucket list, creating a sense of comradery. They were amazed to learn their marketing person was a linear thinker, based on how he listed the items on his billboard, the group was astounded considering how creative he is in developing their marketing materials. This exercise helped them embrace a sense of sameness and at the same time celebrate uniqueness. As they walked they were encouraged to make comments or check marks on the billboards. After allowing sufficient time the ELC gave employees “homework.” Each employee is to have coffee or lunch with another employee they do not normally interact with and find out more about them personally and how their job contributes to the success of CVEP. The ELC modeled this homework after their own 30 day goal. All employees will be required to report back at the next all staff meeting (TBD) on their findings.

The next section of the meeting was the ELC presentation of the thematic goal and personal stories of how grateful they were to HARC, La Piana and GCG for the opportunity to learn and grow. They committed to the team of CVEP that positive change was coming, and it is an exciting time to be a CVEP employee. They allowed for questions and clarification of goals. The

most important take away for the employees was the ELC showed a united front, a cohesive unit, something that had been identified as missing in both La Piana and HARC assessments.

The ELC explained all employees will be involved in the process and played a vital role to the success of the thematic goal.

The next team building activity was Jeopardy. It was evident from the feel of the room CVEP staff was engaged in the process.

Closure

It is evident CVEP as an organization is moving forward in the right direction.

CVEP has already secured the services of a Financial Consultant, proficient in SAGE software to further develop their controller. They have secured the services of GCG to begin developing job descriptions. It is the understanding of GCG the HR support will be expanded in January 2015 to begin developing the administrative infrastructure and management trainings.

The HARC recommendations included the employees desire to be further trained, at this moment there has been no discussion regarding that aspect of the assessment.

In closure, GCG has conducted the Five Dysfunctions training for several for profit and non-profit organizations. The success of the training for CVEP can only be contributed to the hard work and dedication of CVEP's Employee Leadership Council. It was an honor to work with them. Thank you for the opportunity.

Appendix D: Program Evaluation Survey for Leadership

Program Evaluation for Leadership Page 1: Introduction

This survey is designed to assess your satisfaction with your work environment, and how this may (or may not) have changed in the past 6 months.

This survey should take you between 15 to 20 minutes to complete. You can take the survey during your normal workday--you will be paid for that time and do not need to consider it a break time. Please be as detailed as possible in your responses!

Everything you say on this survey will be kept completely confidential. At no time will your supervisor or any of your coworkers get to see your responses. Only the researchers at HARC will be able to see your individual responses.

If you have any questions or concerns, please contact Dr. Jenna LeComte-Hinely at HARC:
jlecomte-hinely@HARCdata.org
760-404-1945

Please click "next" to start the survey!

Program Evaluation for Leadership Page 2: About You

1. Please fill out some details about yourself. This will ONLY be seen by HARC staff; your individual responses will never be reported to anyone at CVEP.

- First Name
- Last Name

2. What CVEP site or location do you work at for the MAJORITY of the time?

- Main office (Tahquitz Canyon Way, Palm Springs)
- Workforce Excellence office (Dinah Shore Drive, Palm Desert)
- Other site (please specify)

3. How many hours do you typically work for CVEP each week?

Program Evaluation for Leadership Page 3: Health

4. Would you say, in general, that your health is...

- Excellent
- Very good
- Good
- Fair
- Poor

5. How would you rate your PHYSICAL health?

- Excellent
- Very good
- Good
- Fair
- Poor

6. How would you rate your MENTAL health?

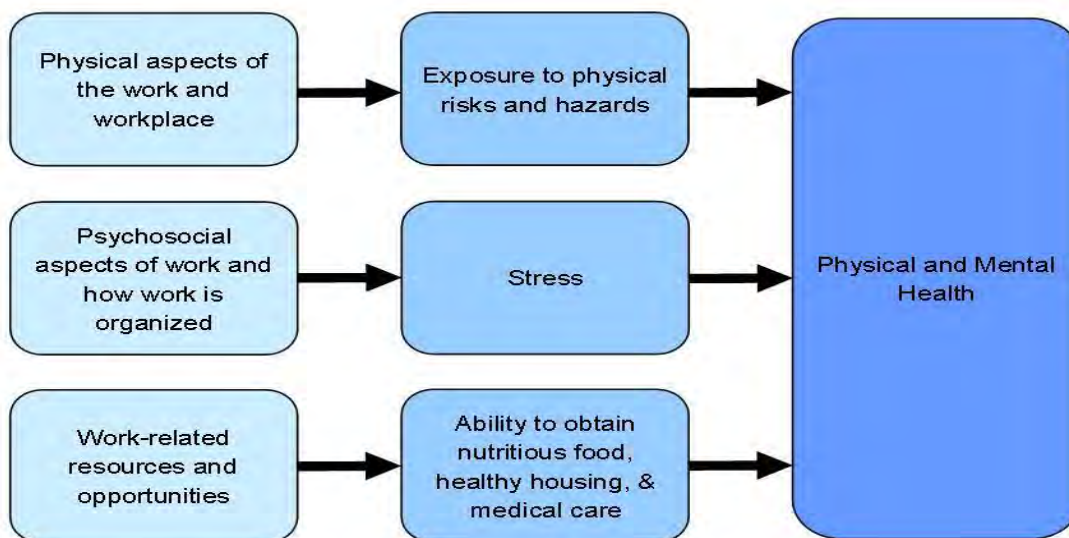
- Excellent
- Very good
- Good
- Fair
- Poor

Program Evaluation for Leadership Page 4: Three Aspects of Health

The next sections will focus on three areas of your work environment:

1. The PHYSICAL work environment
2. The PSYCHOSOCIAL work environment
3. The work-related RESOURCES your work provides for you

Each of these areas are an important part of how work impacts your health and wellness.



Source: Robert Wood Johnson Foundation

Program Evaluation for Leadership Page 5: Physical Work Environment

7. Have you ever been injured while at working for CVEP?

- I have never been injured at work
- I have had very minor injuries at work - things like paper cuts, bruises, etc.
- I have had moderate injuries at work - things like sprains, strains, more serious cuts, etc.
- I have had serious injuries at work that required a trip to a doctor, time off work, and/or workers' comp

8. How much do you worry about being injured during your regular work for CVEP?

- I almost never worry about being hurt at work
- I rarely worry about being hurt at work
- I sometimes worry about being hurt at work
- I frequently worry about being hurt at work

9. How physically comfortable are you at work?

- I am very comfortable
- I am somewhat comfortable
- I am not really comfortable or uncomfortable
- I am somewhat uncomfortable
- I am really uncomfortable

10. How would you rate your ergonomics experience in your day-to-day work environment?

- Very good - I almost never have any aches, pains, or strains from work
- Good - I have aches, pains, or strains resulting from my work once a month or less
- Neither - I'm not really sure whether or not work is causing me aches, pains, or strains
- Poor - I have aches, pains, or strains resulting from my work at least once a week
- Very poor - I feel aches, pains, or strains from work every day

11. Did you have an ergonomic assessment done? These were offered by HARC in August and September, and conducted by Gina Malloy, a physical therapist with New Beginning Physical Therapy.

- Yes
- No

Program Evaluation for Leadership Page 6: Ergonomic Assessment

[Skip logic: This page was only shown to those who answered “Yes” to #11]

12. Of the recommendations that Gina made, how many have you adopted?

- I have not implemented any of the changes that Gina recommended
- I have implemented some of the changes that Gina recommended
- I have implemented all of the changes that Gina recommended

13. Considering how comfortable you were in your workstation before the ergonomic assessment, do you think the ergonomic assessment (and resulting changes) have made a difference in your level of ergonomic comfort at work?

- My workplace ergonomics are very much improved
- My workplace ergonomics are somewhat improved
- My workplace ergonomics are about the same
- My workplace ergonomics are a little worse
- My workplace ergonomics are much worse

14. Please share a little bit about your experience with the ergonomic assessment and how you think it may have impacted your workplace wellness.

Program Evaluation for Leadership Page 7: Psychosocial Work Environment

15. How would you rate your current workload?

- Really overloaded - I have way too much work
- A little too heavy - I have a bit too much work for me to handle
- Just right - I have enough work to keep me busy but not too much
- A little too light - Sometimes I run out of things to do
- Not enough - I am often bored or don't have enough to do

16. Do you feel that you have the tools you need to get your work done? When thinking about "tools", think about whether you have the skills, programs/software, staffing capabilities, or other resources that can help you to do your job effectively and efficiently.

- I have all the tools I need to do my work
- I have some of the tools I need to do my work, but others would be helpful
- I don't have the tools I need to do my work effectively and efficiently

17. "Job clarity" is the level of understanding you have about what you need to do each day at work in order to really excel at your job and help CVEP succeed. How would you rate your level of job clarity?

- Very strong - I know exactly what I need to do each day
- Strong - I know what I need to do in general
- Neither strong nor weak
- Weak - I know overall what I should do, but I don't know what actions to take to get there
- Very weak - I am very confused about what I should be doing

18. "Job control" is the extent to which you have control over how your work gets done--you get to make decisions about which tasks have priority, how you will accomplish those tasks, and when those tasks get done. How would you rate your level of job control?

- Very strong - I am in complete control of how I get things done
- Strong
- Neither strong nor weak
- Weak
- Very weak - I have no control over how I work

Program Evaluation for Leadership Page 8: Psychosocial Work Environment

19. "Work-life balance" is when your work is flexible enough for you to easily meet both your work needs and your needs outside of work (like taking care of kids or parents, managing your household, and seeing healthcare providers when you need it). How would you rate your work-life balance?

- Very good
- Good
- Neutral
- Poor
- Very poor

20. In general, how would you rate your relationship with your immediate coworkers--the ones that you interact with on a weekly (or more frequent) basis?

- Very good - We are a great team
- Good
- Neutral
- Poor
- Very poor - We do not work well together as a team

21. In general, how would you rate your relationship with the other staff members throughout CVEP (the entire staff)?

- Very good - We are a great team
- Good
- Neutral
- Poor
- Very poor - We do not work well together as a team

22. How supportive is your immediate supervisor? When thinking about "support", think about whether your supervisor backs you up, provides you with the tools you need to do your job well, is fair and equitable, and/or caring about your personal well-being.

- Very supportive
- Fairly supportive
- Not very supportive
- Not supportive at all

Program Evaluation for Leadership Page 9: Psychosocial Work Environment – Job Shadowing

23. As a part of this process, you had the opportunity to job shadow another coworker. Please tell us a little more about your experience getting to know this other employee. Did you learn anything new? Was it enjoyable? Surprising? Informative?

Program Evaluation for Leadership Page 10: Psychosocial Work Environment – Training

During this process, you completed a half-day seminar with Claudell Greear-Maggio in August about the "Five Dysfunctions of Team Training". Next you attended a retreat with Claudell in late September. During these sessions, you identified barriers to success, set goals, and established objectives.

24. Have you made any changes to the way you work (and/or manage your employees) as a result of what you learned at the sessions with Claudell? If so, what changes have you made?

25. Which of the following statements best describes the impact that Claudell's work had on your overall management skills?

- Sessions with Claudell greatly improved my management skills
- Sessions with Claudell somewhat improved my management skills
- Sessions with Claudell did not improve my management skills at all

26. Do you feel that the seminars you did with Claudell helped to bring the two offices together as one team?

- The sessions with Claudell helped bring us together a great deal
- The sessions with Claudell helped bring us together a little
- The sessions with Claudell didn't really help bring us together

27. Do you think communication at CVEP has changed since your work with Claudell?

- Yes, our communication has improved
- No, our communication has not really changed
- Yes, our communication has worsened

28. Please tell us a little more about your experience working with Claudell in these sessions. For example, did you learn new things? Was it surprising? Informative? Do you think it was valuable?

Program Evaluation for Leadership Page 11: Psychosocial Work Environment – All-Staff Meeting

29. What did you think about the October All-Staff Meeting at the Agua Caliente Resort?

- It was extremely useful
- It was somewhat useful
- It was a nice thought, but not really effective
- It was a waste of time

30. Please tell us a little more about how the October All-Staff Meeting was a POSITIVE experience. For example, what parts of the All-Staff Meeting were enjoyable, interesting, or helpful for you? What did you learn?

31. Please tell us a little more about how the October All-Staff Meeting was a NEGATIVE experience. For example, what parts of the All-Staff Meeting were annoying or not helpful? How could it be improved?

32. Please indicate which of the following statements best describes your feelings about your relationships with other staff members after the All-Staff Meeting.

- We work much better together as a team since the All-Staff Meeting
- We work a little bit better together as a team since the All-Staff Meeting
- Our teamwork is about the same as it was before the All-Staff Meeting
- We work a little bit worse together as a team since the All-Staff Meeting
- We work much worse together as a team since the All-Staff Meeting

Program Evaluation for Leadership Page 11: Work-Related Resources and Opportunities

33. How would you rate your satisfaction with your current pay level?

- Very high
- High
- Adequate
- Low
- Very low

34. How would you rate the benefits that CVEP provides for you? "Benefits" includes health insurance, 401k plans, and other employer-provided benefits.

- Very good
- Good
- Neutral
- Poor
- Very poor
- CVEP does not provide employee benefits for me

35. How would you rate the paid time off (PTO) package CVEP provides for you? "PTO" includes vacation, holidays, and sick leave.

- Very good - I have more PTO days than I need
- Good - I have plenty of PTO days to meet my needs/wants
- Neutral
- Poor - I need/want some more PTO days than I currently have
- Very poor - I need/want many more PTO days than I currently have
- CVEP does not provide me with any PTO

36. How would you rate the development opportunities that CVEP provides for you? "Development opportunities" include trainings, workshops, or other opportunities to develop your existing skills, teach you new skills, or make you more marketable as an employee.

- Very good
- Good
- Neutral
- Poor
- Very poor
- CVEP does not provide me with any development opportunities

37. What, if any, types of professional development training would you like to have CVEP provide for you in the future?

Program Evaluation for Leadership Page 12: Anything Else?

38. Do you think your work environment has changed over the past 6 months?

- Yes, the work environment is better than it was 6 months ago
- No, the work environment has not changed in the past 6 months
- Yes, the work environment is worse than it was 6 months ago

39. This project was a pilot project conducted by HARC to improve workplace wellness. The project included meeting with your leadership, presenting at the All-Staff Meeting, conducting an online needs assessment, making recommendations for action to address those needs, providing ergonomic assessments, and providing training to your senior leadership to increase team collaboration and create consistent policies and practices throughout the organization. We called this "workplace wellness". From your perspective as someone who went through the process, is there a better name? What would YOU call this project?

40. Is there anything else that you think we should know about your experience with this project?

41. Is there anything else that you think we should know about your work environment?

Program Evaluation for Leadership Page 13: Thank You

Thank you for completing this survey! If you have any other feedback, questions, or concerns about this survey or the wellness program, please contact HARC's Director of Research and Evaluation, Dr. Jenna LeComte-Hinely, at jlecomte-hinely@HARCdata.org or by phone at 760-404-1945.

Appendix E: Program Evaluation Survey for Staff

Program Evaluation for Staff Page 1: Introduction

This survey is designed to assess your satisfaction with your work environment, and how this may (or may not) have changed in the past 6 months.

This survey should take you between 15 to 20 minutes to complete. You can take the survey during your normal workday--you will be paid for that time and do not need to consider it a break time. Please be as detailed as possible in your responses!

Everything you say on this survey will be kept completely confidential. At no time will your supervisor or any of your coworkers get to see your responses. Only the researchers at HARC will be able to see your individual responses.

If you have any questions or concerns, please contact Dr. Jenna LeComte-Hinely at HARC:
jlecomte-hinely@HARCdata.org
760-404-1945

Please click "next" to start the survey!

Program Evaluation for Staff Page 2: About You

1. Please fill out some details about yourself. This will ONLY be seen by HARC staff; your individual responses will never be reported to anyone at CVEP.

- First Name
- Last Name

2. What CVEP site or location do you work at for the MAJORITY of the time?

- Main office (Tahquitz Canyon Way, Palm Springs)
- Workforce Excellence office (Dinah Shore Drive, Palm Desert)
- Other site (please specify)

3. How many hours do you typically work for CVEP each week?

Program Evaluation for Staff Page 3: Health

4. Would you say, in general, that your health is...

- Excellent
- Very good
- Good
- Fair
- Poor

5. How would you rate your PHYSICAL health?

- Excellent
- Very good
- Good
- Fair
- Poor

6. How would you rate your MENTAL health?

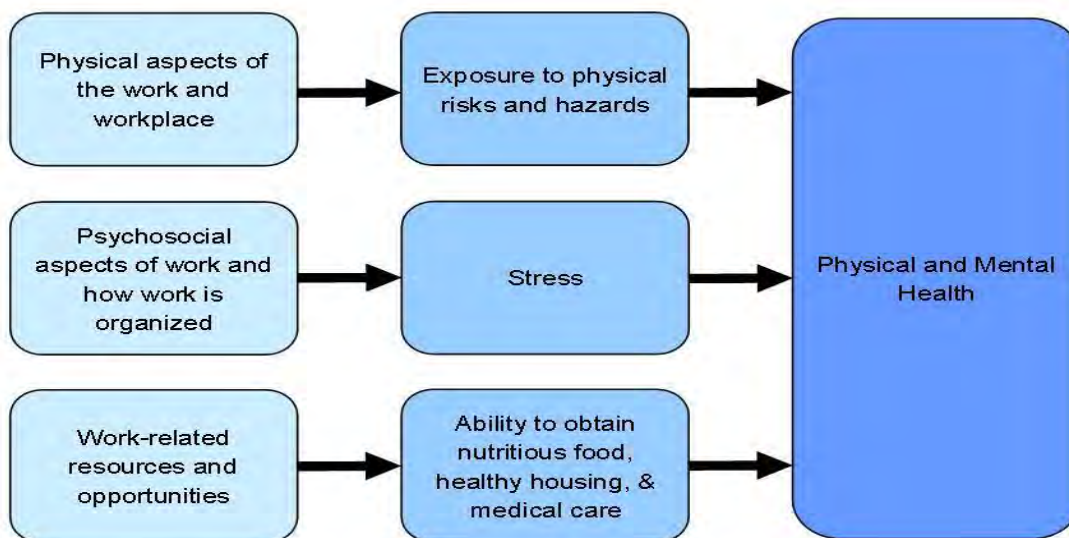
- Excellent
- Very good
- Good
- Fair
- Poor

Program Evaluation for Staff Page 4: Three Aspects of Health

The next sections will focus on three areas of your work environment:

1. The PHYSICAL work environment
2. The PSYCHOSOCIAL work environment
3. The work-related RESOURCES your work provides for you

Each of these areas are an important part of how work impacts your health and wellness.



Source: Robert Wood Johnson Foundation

Program Evaluation for Staff Page 5: Physical Work Environment

7. Have you ever been injured while at working for CVEP?
- I have never been injured at work
 - I have had very minor injuries at work - things like paper cuts, bruises, etc.
 - I have had moderate injuries at work - things like sprains, strains, more serious cuts, etc.
 - I have had serious injuries at work that required a trip to a doctor, time off work, and/or workers' comp
8. How much do you worry about being injured during your regular work for CVEP?
- I almost never worry about being hurt at work
 - I rarely worry about being hurt at work
 - I sometimes worry about being hurt at work
 - I frequently worry about being hurt at work
9. How physically comfortable are you at work?
- I am very comfortable
 - I am somewhat comfortable
 - I am not really comfortable or uncomfortable
 - I am somewhat uncomfortable
 - I am really uncomfortable
10. How would you rate your ergonomics experience in your day-to-day work environment?
- Very good - I almost never have any aches, pains, or strains from work
 - Good - I have aches, pains, or strains resulting from my work once a month or less
 - Neither - I'm not really sure whether or not work is causing me aches, pains, or strains
 - Poor - I have aches, pains, or strains resulting from my work at least once a week
 - Very poor - I feel aches, pains, or strains from work every day
11. Did you have an ergonomic assessment done? These were offered by HARC in August and September, and conducted by Gina Malloy, a physical therapist with New Beginning Physical Therapy.
- Yes
 - No

Program Evaluation for Staff Page 6: Ergonomic Assessment

[Skip logic: This page was only shown to those who answered “Yes” to #11]

12. Of the recommendations that Gina made, how many have you adopted?

- I have not implemented any of the changes that Gina recommended
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- I have implemented all of the changes that Gina recommended

13. Considering how comfortable you were in your workstation before the ergonomic assessment, do you think the ergonomic assessment (and resulting changes) have made a difference in your level of ergonomic comfort at work?

- My workplace ergonomics are very much improved
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- My workplace ergonomics are much worse

14. Please share a little bit about your experience with the ergonomic assessment and how you think it may have impacted your workplace wellness.

Program Evaluation for Staff Page 7: Psychosocial Work Environment

15. How would you rate your current workload?

- Really overloaded - I have way too much work
- A little too heavy - I have a bit too much work for me to handle
- Just right - I have enough work to keep me busy but not too much
- A little too light - Sometimes I run out of things to do
- Not enough - I am often bored or don't have enough to do

16. Do you feel that you have the tools you need to get your work done? When thinking about "tools", think about whether you have the skills, programs/software, staffing capabilities, or other resources that can help you to do your job effectively and efficiently.

- I have all the tools I need to do my work
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- Very strong - I am in complete control of how I get things done
- Strong
- Neither strong nor weak
- Weak
- Very weak - I have no control over how I work

Program Evaluation for Staff Page 8: Psychosocial Work Environment

19. "Work-life balance" is when your work is flexible enough for you to easily meet both your work needs and your needs outside of work (like taking care of kids or parents, managing your household, and seeing healthcare providers when you need it). How would you rate your work-life balance?

- Very good
- Good
- Neutral
- Poor
- Very poor

20. In general, how would you rate your relationship with your immediate coworkers--the ones that you interact with on a weekly (or more frequent) basis?

- Very good - We are a great team
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- Very good - We are a great team
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22. How supportive is your immediate supervisor? When thinking about "support", think about whether your supervisor backs you up, provides you with the tools you need to do your job well, is fair and equitable, and/or caring about your personal well-being.

- Very supportive
- Fairly supportive
- Not very supportive
- Not supportive at all

Program Evaluation for Staff Page 9: Psychosocial Work Environment – All-Staff Meeting

23. Did you attend the all-staff meeting at the Agua Caliente Resort on October 16th?

- Yes
- No

24. What did you think about the All-Staff Meeting?

- It was extremely useful
- It was somewhat useful
- It was a nice thought, but not really effective
- It was a waste of time

25. Please tell us a little more about how the October All-Staff Meeting was a POSITIVE experience. For example, what parts of the All-Staff Meeting were enjoyable, interesting, or helpful for you? What did you learn?

26. Please tell us a little more about how the October All-Staff Meeting was a NEGATIVE experience. For example, what parts of the All-Staff Meeting were annoying or not helpful? How could it be improved?

27. Please indicate which of the following statements best describes your feelings about your relationships with other staff members after the All-Staff Meeting.

- We work much better together as a team since the All-Staff Meeting
- We work a little bit better together as a team since the All-Staff Meeting
- Our teamwork is about the same as it was before the All-Staff Meeting
- We work a little bit worse together as a team since the All-Staff Meeting
- We work much worse together as a team since the All-Staff Meeting

28. At the All-Staff Meeting, you were assigned "homework": to have coffee or lunch with another employee that you do not normally interact with and find out more about them personally and how their job contributes to the success of CVEP. Have you completed this "homework" yet?

- Yes
- No

Program Evaluation for Staff Page 10: Psychosocial Work Environment – Getting to Know Your Coworkers

29. Please tell us a little more about your experience getting to know this other employee. Did you learn anything new? Was it enjoyable? Surprising? Informative?

Program Evaluation for Staff Page 11: Work-Related Resources and Opportunities

30. How would you rate your satisfaction with your current pay level?

- Very high
- High
- Adequate
- Low
- Very low

31. How would you rate the benefits that CVEP provides for you? "Benefits" includes health insurance, 401k plans, and other employer-provided benefits.

- Very good
- Good
- Neutral
- Poor
- Very poor
- CVEP does not provide employee benefits for me

32. How would you rate the paid time off (PTO) package CVEP provides for you? "PTO" includes vacation, holidays, and sick leave.

- Very good - I have more PTO days than I need
- Good - I have plenty of PTO days to meet my needs/wants
- Neutral
- Poor - I need/want some more PTO days than I currently have
- Very poor - I need/want many more PTO days than I currently have
- CVEP does not provide me with any PTO

33. How would you rate the development opportunities that CVEP provides for you? "Development opportunities" include trainings, workshops, or other opportunities to develop your existing skills, teach you new skills, or make you more marketable as an employee.

- Very good
- Good
- Neutral
- Poor
- Very poor
- CVEP does not provide me with any development opportunities

34. What, if any, types of professional development training would you like to have CVEP provide for you in the future?

Program Evaluation for Staff Page 12: Anything Else?

35. Do you think your work environment has changed over the past 6 months?

- Yes, the work environment is better than it was 6 months ago
- No, the work environment has not changed in the past 6 months
- Yes, the work environment is worse than it was 6 months ago

36. This project was a pilot project conducted by HARC to improve workplace wellness. The project included meeting with your leadership, presenting at the All-Staff Meeting, conducting an online needs assessment, making recommendations for action to address those needs, providing ergonomic assessments, and providing training to your senior leadership to increase team collaboration and create consistent policies and practices throughout the organization. We called this "workplace wellness". From your perspective as someone who went through the process, is there a better name? What would YOU call this project?

37. Is there anything else that you think we should know about your experience with this project?

38. Is there anything else that you think we should know about your work environment?

Program Evaluation for Staff Page 13: Thank You

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