Solicitation PH RFP 171180

Healthy Arizona Worksite Program (HAWP) Schools Instructional Design Project

Bid Designation: Public

Maricopa County

Bid PH RFP 171180
Healthy Arizona Worksite Program (HAWP) Schools Instructional Design Project

Bid Number	PH RFP 171180
Bid Title	Healthy Arizona Worksite Program (HAWP) Schools Instructional Design Project
Bid Start Date	Feb 8, 2017 11:17:43 AM MST
Bid End Date	Feb 28, 2017 2:00:00 PM MST
Bid Contact	Cheryl Rentscheler Procurement Supervisor 602-**506**-6886 cherylrentscheler@mail.maricopa.gov
Contract Duration	**90 days**
Contract Renewal	4 annual renewals
Prices Good for	**30 days**
Bid Comments	**MCDPH is in need of an instructional designer experienced with school staff worksite wellness and adult learning experience to develop content specific to the needs of school district employees for their Healthy Arizona Worksite Program (HAWP).** **Total budget is not to exceed $40,000 and should line item out cost per hour for design, project management, subcontractors, and other related costs. Project needs to be completed by June 15, 2017 and proposal shall include a timeline for completion.**

Item Response Form

Item	**PH RFP 171180-01-01 -** Healthy Arizona Worksite Program (HAWP) Schools Instructional **Design Project**
Quantity	**1 project**
Unit Price	
Delivery Location	**Maricopa County** Maricopa County Department of Public Health 4041 N Central Ave Suite 700 Phoenix AZ 85012 **Qty** 1

Description
Healthy Arizona Worksite Program (HAWP) Schools Instructional Design Project

BIDSYNC ELECTRONIC SUBMISSION INSTRUCTIONS

When submitting a response (proposal, quote or bid) electronically through BidSync, it is the sole responsibility of the supplier to ensure that the response is received by BidSync prior to the closing date and time. Each of the following steps in BidSync MUST be completed in order to place an offer:

A. Login to www.bidsync.com;
B. Locate the bid (solicitation) to which you are responding;
   a. Click the "Search" tab on the top left of the page;
   b. Enter keyword or bid (solicitation) number and click "Search";
C. Click on the "Bid title/description" to open the Bid (solicitation) Information Page;
D. "View and Accept" the following documents in the document section;
   Attachment A (VENDOR INFORMATION)- Webform
   Attachment B (AGREEMENT) - Webform
   Attachment C (REFERENCES) - Webform
   Other documents as required
E. Select "Place Offer" found at the bottom of the page;
F. Enter your pricing, notes, other required information and upload attachments to this page;
G. Click "Submit" at the bottom of the page;
H. Review Offer(s); and
I. Enter your password and click "Confirm".

Note that the final step in submitting a response involves the supplier's acknowledgement that the information and documents entered into the BidSync system are accurate and represent the supplier's actual proposal, quote or bid. This acknowledgement is registered in BidSync when the supplier clicks "Confirm". BidSync will post a notice that the offer has been received. This notice from BidSync MUST be recorded prior to the closing date and time or the response will be considered late and will not be accepted. Be aware that entering information and uploading documents into BidSync may take considerable time. Please allow sufficient time to complete the online forms and upload documents. Suppliers should not wait until the last minute to submit a response. It is recommended that suppliers submit responses a minimum of 24 hours prior to the closing deadline. The deadline for submitting information and documents will end at the closing time indicated in the solicitation. All information and documents must be fully entered, uploaded, acknowledged (Confirm) and recorded into BidSync before the closing time or the system will stop the process and the response will be considered late and will not be accepted.

Responses submitted in BidSync are completely secure. No one (including County purchasing staff) can see responses until after the deadline. Suppliers may modify or change their response at any time prior to the closing deadline. However, all modifications or changes must be completed and acknowledged (Confirm) in the BidSync system prior to the deadline. BidSync will post a notice that the modification/change (new offer) has been received. This notice from BidSync MUST be recorded prior to the closing date and time or the response will be considered late and will not be accepted. If you have not been asked to enter your password and click Save to save your response, your offer has not been updated.

Please be aware that typing in your password acts as your electronic signature, which is just as legal and binding as an original signature. (See Electronic Signatures in Global and National Commerce Act for more information.)

The County reserves the right to award in whole or in part, by item or group of items, by section or geographic area, or make multiple awards, where such action serves the County's best interest.

Bids must be signed by an owner, partner or corporate official who has been authorized to make such commitments. All prices shall be held firm for a period of one hundred fifty (150) days after the bid closing date.

NOTICE OF SOLICITATION

Serial # - PH RFP 171180

REQUEST FOR PROPOSAL FOR: HEALTHY ARIZONA WORKSITE PROGRAM (HAWP) SCHOOLS INSTRUCTIONAL DESIGN PROJECT

The Maricopa County Procurement Code ("The Code") governs this procurement and is incorporated by this reference. Any protest concerning this request for proposal must be filed with the Procurement Consultant in accordance with Section MC1-905 of the Code.

Notice is hereby given that sealed proposals will be accepted via www.bidsync.com by the Maricopa County Department of Public Health Department, 4041 N. Central Avenue, #1400, Phoenix, Arizona 85012, through 2:00 P.M./Arizona time on **February 28, 2017** for the furnishing of the following services for Maricopa County.

To participate in this bidding process, vendors shall register through BidSync.com. To register with BidSync, please go to www.BidSync.com and click on the orange 'Register' link. Registration has no cost, and will allow you to access all of the bid information, bid documents, receive bid notifications, and submit a response. **ONLY RESPONSES THAT ARE SUBMITTED THROUGH BIDSYNC.COM WILL BE CONSIDERED FOR AWARD.**

For assistance, please contact BidSync Vendor Support Department via phone or email, during regular business hours: 1-800-990-9339 or agencysupport@BidSync.com

All responses shall be submitted **electronically** to www.BidSync.com prior to the bid closing. The bid will be listed under **"PH RFP 171180 - REQUEST FOR PROPOSAL FOR Healthy Arizona Worksite Program (HAWP) School Instructional Design Project"**

Requirements to Apply:

Submit all required items listed under "Requirements to Apply" in this document via www.bidsync.com **no later than 2:00pm February 28, 2017.**

Maricopa County reserves the right to accept or reject, in whole or in part, all applicants submitted and/or to cancel this announcement. Any contracts awarded shall be based upon the applicant most advantageous to Maricopa County at the discretion of Maricopa County.

1.0 BACKGROUND:

Since 2012 Maricopa County Department of Public Health (MCDPH) has been implementing the Healthy Arizona Worksite Program (HAWP) worksite wellness 101 training to Arizona employers. The training covers the basic principles of comprehensive, evidence-based wellness programs, how to implement worksite wellness and apply for the Healthy Arizona Worksite recognition award. The goal of this training is to empower employers to make a difference in the health and well-being of their employees and reduce the burden of chronic disease in Arizona's population. A recent review of the training evaluations indicated there is a need for creating a HAWP 102 School Staff Wellness training course. A recent research project conducted by the MCDPH identified the needs and interests of the pressing health needs of school district employees and what cost effective sustainable and impactful efforts can be taken to improve the health and safety of employees in school settings. The course would contain the framework of the current HAWP 101 curriculum, but with a focus on the wellness needs of school staff. The targeted outcome is that participants leave the training with a full understanding of the model for comprehensive, evidence-based worksite wellness programming in schools. In addition, participants will have the capacity and motivation to move through the required steps to apply for the HAWP recognition award, including the development and implementation of a school worksite health improvement plan.

Due to the need for this school focused curriculum, MCDPH is in need of an instructional designer experienced with school staff worksite wellness and adult learning experience to develop content specific to the needs of school district employees.

Total budget is not to exceed $40,000 and should line item out cost per hour for design, project management, subcontractors, and other related costs. Project needs to be completed by **June 15, 2017** and proposal shall include a timeline for completion.

Ideally, successful respondent should have the following qualifications:

- Demonstrated understanding of adult learning techniques and instructional design principles
- Demonstrated understanding of modern training and delivery methods and techniques, with an emphasis on training methodologies for adult education (including self-directed, facilitated training
- Demonstrated understanding and experience with worksite wellness for employees in schools
- Demonstrated experience with School personnel
- Understanding of school staff environment, restrictions and guidelines including unions
- Strong project and program management skills
- At least three years' experience as an instructional designer with formal instructional design experience
- Experience designing instructional training targeted to employers and/or human resource professionals preferred

Multiple contracts with successful candidates may be awarded and Maricopa County reserves the right to award to the Contractors most advantageous to the County.

2.0 SCOPE OF WORK:

The Contractor shall:

2.1 Using the elements and modules from the HAWP 101 curriculum, that is contained in the Power Point slide deck in Exhibit 1, condensing to a two hour training, and to include the key principles for School Employee Wellness Programs found in the School Employee Wellness: A guide for Protecting the Assests of our Nation's Schools. http://www.dhpe.org/members/group_content_view.asp?group=87568&id=12483.

2.2 Create learning activities or exercises designed to increase the capacity of School Staff participants to move through the steps of the HAWP program and apply for the recognition award.

2.3 Create a course facilitator guide/manual.

2.4 Create 250 participant toolkits/guides to be kept as a reference including slides, information on designing, implementing and assessing a school staff wellness program as well as a School Staff Wellness Toolkit.

2.4.1 The toolkit is to include:

- Slide deck
- Note pages/area
- Comprehensive evidence based tools and resources for healthy eating, physical activity and stress management specific to Schools.
- In addition information on the:
  - School Health Index tool Module 7- https://www.cdc.gov/healthyschools/shi/training/index.htm
  - The school employee wellness checklist - http://c.ymcdn.com/sites/www.dhpe.org/resource/group/75a95e00-448d-41c5-8226-0d20f29787de/Downloadable_Materials/EntireGuide.pdf?hhSearchTerms=%22school+and+employee+and+wellness%22 pg.38

2.5 Provide train the trainer training to ensure effective delivery of the HAWP school curriculum and implementation of activities and exercises.

2.6 Work closely with MCDPH staff to understand the goals and objectives of the HAWP 102 School Staff Wellness training through regularly scheduled contact via webinars and face to face meetings.

2.7 Evaluate and make recommendations to MCDPH on School Wellness best practice for design standards and literacy levels in engaging adult learners.

2.8 Assist, as needed, in reaching out to organizations for rights/permissions to re-design existing information utilized in the toolkit or additional information included in School staff Wellness Guides.

2.9 Adhere to graphic design standards set forth by MCDPH staff such as the use of MCDPH logo and other partner logos.

2.10 Participate in technical assistance partner meetings as needed to better understand the needs of the participants' toolkit.

2.11 Maintain branding of deliverables that is consistent with the Healthy Arizona Worksites Program branding.
2.12 Participate in the training of the trainer(s) for the HAWP 102 School Staff Wellness training course delivery. Evaluate trainers' readiness to competently deliver training using the MCDPH evaluation tool (See Exhibit 2) to check for readiness.
2.13 Participate in a pilot training to provide feedback and performance improvement.

3.0 REQUIREMENTS TO APPLY:

To aid in the evaluation, it is desired that all proposals follow the same general format. The proposal must have sections as described below: (Responses are limited to 20 pages, single sided, 12 point font type). Please submit your entire response in one single document uploaded as a pdf or Word file to www.bidsync.com.

3.1 Letter of Introduction
3.2 Proposal – This section shall address how you intend to perform the services contained herein and what existing program(s) your organization currently has that may complement the goals of this proposal. Include a proposed timeline.
3.3 Qualifications – This section shall describe your organization's ability and previous experience related to the programs and services described. Include samples of recent instructional design projects targeted toward Adult learners.
3.4 Compensation - This section shall detail the expected compensation and propose a payment schedule tied to specific deliverables.
3.5 Proposal exceptions
3.6 Attachment A – Pricing Sheet
3.7 Attachment B - List of references
3.8 Attachment C – Sole Proprietor Waiver (if required)
3.9 Signed Agreement

4.0 QUALIFICATIONS & SELECTION CRITERIA:

The following qualifications are listed in the order of importance:

4.1 Previous experience in providing the same or similar services
4.2 Proposed methodology of meeting program goals
4.3 Total cost
4.4 Project timeline

5.0 SPECIAL TERMS AND CONDITIONS:

5.1 CONTRACT LENGTH:

This Request for Proposal is for awarding a fixed term contract to cover a 3 month period.

5.2 OPTION TO EXTEND:

Subject to availability of funds and acceptable Contractor performance, the Contractor hereby acknowledges and agrees that the County shall have the right to extend this Contract for additional periods, not to exceed a total term of five (5) years from the original effective date, except that cost will be subject to renegotiation. Any extension of Contract period must be mutually acceptable to the County and the Contractor and signed by both parties in writing.

5.3 INDEMNIFICATION:

To the fullest extent permitted by law, and to the extent that claims, damages, losses or expenses are not covered and paid by insurance purchased by the Contractor, the Contractor shall defend indemnify and hold harmless the County (as Owner), its agents, representatives, agents, officers, directors, officials, and employees from and against all claims, damages, losses, and expenses (including, but not limited to attorneys' fees, court costs, expert witness fees, and the costs and attorneys' fees for appellate proceedings) arising out of, or alleged to have resulted from the negligent acts, errors, omissions, or mistakes relating to the performance of this Contract.

Contractor's duty to defend, indemnify, and hold harmless the County, its agents, representatives, agents, officers, directors, officials, and employees shall arise in connection with any claim, damage, loss, or expense that is attributable to bodily injury, sickness, disease, death or injury to, impairment of, or destruction of tangible property, including loss of use resulting there from, caused by negligent acts, errors, omissions, or mistakes in the performance of this Contract, but only to the extent caused by the negligent acts or omissions of the Contractor, a subcontractor, any one directly or indirectly employed by them, or anyone for whose acts they may be liable, regardless of whether or not such claim, damage, loss, or expense is caused in part by a party indemnified hereunder.

The amount and type of insurance coverage requirements set forth herein will in no way be construed as limiting the scope of the indemnity in this paragraph.

The scope of this indemnification does not extend to the sole negligence of County.

Each Party (as "indemnitor") agrees to indemnify, defend, and hold harmless the other Party (as "indemnitee") from and against any and all claims, losses, liability, costs, or expenses (including reasonable attorney's fees) (hereinafter collectively referred to as "claims") arising out of the negligent performance of this Agreement, but only to the extent that such claims which result in vicarious/derivative liability to the indemnitee are caused by the act, omission, negligence, misconduct, or other fault of the indemnitor, its officers, officials, agents, employees, or volunteers.

5.4 INSURANCE.

Contractor, its contractors and subcontractors at Contractor's or its contractors' and subcontractors' own expense, shall purchase and maintain the herein stipulated minimum insurance from a company or companies duly licensed by the State of Arizona and possessing a current A.M. Best, Inc. rating of B++ 6. In lieu of State of Arizona licensing, the stipulated insurance may be purchased from a company or companies, which are authorized to do business in the State of Arizona, provided that said insurance companies meet the approval of County. The form of any insurance policies and forms must be acceptable to County. All insurance required herein shall be maintained in full force and effect until all work or service required to be performed under the terms of the Contract is satisfactorily completed and formally accepted. Failure to do so may, at the discretion of County, constitute a material breach of this Contract. Contractor's insurance shall be primary insurance as respects County, and any insurance or self-insurance maintained by County shall not contribute to it. Any failure to comply with the claim reporting provisions of the insurance policies or any breach of an insurance policy warranty shall not affect the County's right to coverage afforded under the insurance policies. The insurance policies may provide coverage that contains deductibles or self-insurance retentions. Such deductible and/or self-insurance retentions shall not be applicable with respect to the coverage provided to County under such policies. Contractor shall be solely responsible for the deductible and/or self-insurance retention and County, at its option, may require Contractor to secure payment of such deductibles or self-insurance retentions by a surety bond or an irrevocable and unconditional letter of credit. County reserves the right to request and to receive, within 10 business days, certified copies of any or all of the herein required insurance policies and/or endorsements. County shall not be obligated, however, to review such policies and/or endorsements or to advise Contractor of any deficiencies in such policies and endorsements, and such receipt shall not relieve Contractor from, or be deemed a waiver of, County's right to insist on strict fulfillment of Contractor's obligations under this Contract. Contractor and its contractors' and subcontractors' insurance policies required by this Contract, except Workers' Compensation, shall name County, its agents, representatives, officers, directors, officials and employees as Additional Insureds. Contractor and its contractors' and subcontractors' insurance policies required hereunder, except Workers' Compensation, shall contain a waiver of transfer of rights of recovery (subrogation) against County, its agents, representatives, officers, directors, officials and employees for any claims arising out of Contractor's work or service.

5.4.1 Commercial General Liability.
Commercial General Liability insurance and, if necessary, Commercial Umbrella insurance with a limit of not less than $2,000,000 for each occurrence, $4,000,000 Products/Completed Operations Aggregate, and $4,000,000 General Aggregate Limit. The policy shall include coverage for premises liability, bodily injury, broad form property damage, personal injury, products and completed operations and blanket contractual coverage, and shall not contain any provisions which would serve to limit third party action over claims. There shall be no endorsement or modifications of the CGL limiting the scope of coverage for liability arising from explosion, collapse, or underground property damage.

5.4.2 Automobile Liability.
Commercial/Business Automobile Liability insurance and, if necessary, Commercial Umbrella insurance with a combined single limit for bodily injury and property damage of not less than $1,000,000 each occurrence with respect to any of the Contractor's

owned, hired, and non-owned vehicles assigned to or used in performance of the Contractor's work or services under this Contract.

5.4.3 Workers' Compensation.
Workers' Compensation insurance to cover obligations imposed by federal and state statutes having jurisdiction of Contractor's employees engaged in the performance of the work or services under this Contract; and Employer's Liability insurance of not less than $1,000,000 for each accident, $1,000,000 disease for each employee, and $1,000,000 disease policy limit. Contractor, its contractors and its subcontractors waive all rights against County and its agents, officers, directors and employees for recovery of damages to the extent these damages are covered by the Workers' Compensation and Employer's Liability or commercial umbrella liability insurance obtained by Contractor, its contractors and its subcontractors pursuant to this Contract.

5.4.4 Errors and Omissions (Professional Liability) Insurance.
Errors and Omissions (Professional Liability) insurance and, if necessary, Commercial Umbrella insurance, which will insure and provide coverage for errors or omissions or professional liability of the CONTRACTOR, with limits of no less than $2,000,000 for each claim.

5.5 Certificates of Insurance.

5.5.1 Prior to commencing work or services under this Contract, Contractor shall have insurance in effect as required by the Contract in the form provided by the County, issued by Contractor's insurer(s), as evidence that policies providing the required coverage, conditions and limits required by this Contract are in full force and effect. Such certificates shall be made available to the County upon 48 hours notice. BY SIGNING THE AGREEMENT PAGE THE CONTRACTOR AGREES TO THIS REQUIREMENT AND FAILURE TO MEET THIS REQUIREMENT WILL RESULT IN CANCELLATION OF CONTRACT.

5.5.1.1 In the event any insurance policy (ies) required by this contract is (are) written on a "claims made" basis, coverage shall extend for two years past completion and acceptance of Contractor's work or services and as evidenced by annual Certificates of Insurance.

5.5.1.2 If a policy does expire during the life of the Contract, a renewal certificate must be sent to County fifteen (15) days prior to the expiration date.

5.5.2 Cancellation and Expiration Notice.

Insurance required herein shall not be permitted to expire, be canceled, or materially changed without thirty (30) days prior written notice to the County.

5.6 CHANGES OR ADDITIONS/DELETIONS OF SERVICE:

The Procurement Officer, by written order, may make changes within the general scope of this Contract in any one or more of the following areas:

1. Work Statement activities reflecting changes in the scope of services, Funding Source or County regulations, policies or requirements.
2. Administrative requirements such as changes in reporting periods, frequency of reports, or report formats required by funding source or County regulations, policies or requirements.

3. If a requirement is deleted, payment to the Contractor will be reduced proportionately to the amount of service reduced in accordance with the proposal price.
4. If additional services are required from this Contract, prices for such additions will be negotiated between the Contractor and the County
5. Additionally, such Order will not direct substantive changes in services to be rendered by the Contractor.

5.7 TERMINATION FOR CONVENIENCE:

The County reserves the right to terminate the Contract, in whole or in part at any time, when in the best interests of the County without penalty or recourse. Upon receipt of the written notice, the Contractor shall immediately stop all work, as directed in the notice, notify all subcontractors of the effective date of the termination and minimize all further costs to the County. All documents, data and reports prepared by the Contractor under the Contract are the property of County, and in the event of termination under this paragraph, shall be delivered to the County upon demand. The Contractor shall be entitled to receive just and equitable compensation for work in progress, work completed and materials accepted before the effective date of the termination.

5.8 CERTIFICATION REGARDING DEBARMENT AND SUSPENSION:

The undersigned (authorized official signing for the Contractor) certifies to the best of his or her knowledge and belief, that the Contractor, defined as the primary participant in accordance with 45 CFR Part 76, and its principals:

5.8.1 are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal Department or agency;

5.8.2 have not within 3-year period preceding this Contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statues or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

5.8.3 are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and have not within a 3-year period preceding this Contract had one or more public transaction (Federal, State or local) terminated for cause of default.

5.8.4 Should the Contractor not be able to provide this certification, an explanation as to why should be attached to the Contact.

5.8.5 The Contractor agrees to include, without modification, this clause in all lower tier covered transactions (i.e. transactions with subcontractors) and in all solicitations for lower tier covered transactions related to this Contract.

5.9 VERIFICATION REGARDING COMPLIANCE WITH ARIZONA REVISED STATUTES §41-4401 AND FEDERAL IMMIGRATION LAWS AND REGULATIONS:

5.9.1 By entering into the Contract, the Contractor warrants compliance with the Immigration and Nationality Act (INA using e-verify) and all other federal immigration laws and regulations related to the immigration status of its employees and A.R.S. §23-214(A). The contractor shall obtain statements from its subcontractors certifying compliance and shall furnish the statements to the Procurement Officer upon request. These warranties shall remain in effect through the

term of the Contract. The Contractor and its subcontractors shall also maintain Employment Eligibility Verification forms (I-9) as required by the Immigration Reform and Control Act of 1986, as amended from time to time, for all employees performing work under the Contract and verify employee compliance using the E-verify system and shall keep a record of the verification for the duration of the employee's employment or at least three years, whichever is longer. I-9 forms are available for download at USCIS.GOV.

5.9.2 The County retains the legal right to inspect contractor and subcontractor employee documents performing work under this Contract to verify compliance with paragraph 5.8.1 of this Section. Contractor and subcontractor shall be given reasonable notice of the County's intent to inspect and shall make the documents available at the time and date specified. Should the County suspect or find that the Contractor or any of its subcontractors are not in compliance, the County will consider this a material breach of the contract and may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

5.10 INFLUENCE

As prescribed in MC1-1202 of the Maricopa County Procurement Code, any effort to influence an employee or agent to breach the Maricopa County Ethical Code of Conduct or any ethical conduct, may be grounds for Disbarment or Suspension under MC1-902. An attempt to influence includes, but is not limited to:

5.10.1 A Person offering or providing a gratuity, gift, tip, present, donation, money, entertainment or educational passes or tickets, or any type valuable contribution or subsidy,

5.10.2 That is offered or given with the intent to influence a decision, obtain a contract, garner favorable treatment, or gain favorable consideration of any kind.

5.10.3 If a Person attempts to influence any employee or agent of Maricopa County, the Chief Procurement Officer, or his designee, reserves the right to seek any remedy provided by the Maricopa County Procurement Code, any remedy in equity or in the law, or any remedy provided by this contract.

5.11 ACCESS TO AND RETENTION OF RECORDS FOR THE PURPOSE OF AUDIT AND/OR OTHER REVIEW:

5.11.1 In accordance with section MCI 367 of the Maricopa County Procurement Code the Contractor agrees to retain all books, records, accounts, statements, reports, files, and other records and back-up documentation relevant to this Contract for six (6) years after final payment or until after the resolution of any audit questions which could be more than six (6) years, whichever is latest. The County, Federal or State auditors and any other persons duly authorized by the Department shall have full access to, and the right to examine, copy and make use of, any and all said materials.

5.11.2 If the Contractor's books, records , accounts, statements, reports, files, and other records and back-up documentation relevant to this Contract are not sufficient to support and document that requested services were provided, the Contractor shall reimburse Maricopa County for the services not so adequately supported and documented.

5.11.3 If at any time it is determined by the County that a cost for which payment has been made is a disallowed cost, the County shall notify the Contractor in writing of the disallowance. The course of action to address the disallowance shall be at sole discretion of the

County, and may include either an adjustment to future claim submitted by the Contractor by the amount of the disallowance, or to require reimbursement forthwith of the disallowed amount by the Contractor by issuing a check payable to Maricopa County.

5.12 UNIFORM ADMINISTRATIVE REQUIREMENTS:

By entering into this Contract the Contractor agrees to comply with all applicable provisions of Title 2, Subtitle A, Chapter II, PART 200—UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS contained in Title 2 C.F.R. § 200 *et seq.*

5.13 AVAILABILITY OF FUNDS:

5.13.1 The provisions of this Contract relating to payment for services shall become effective when funds assigned for the purpose of compensating the Contractor as herein provided are actually available to County for disbursement. The County shall be the sole judge and authority in determining the availability of funds under this Contract. County shall keep the Contractor fully informed as to the availability of funds.

5.13.2 If any action is taken by any state agency, Federal department or any other agency or instrumentality to suspend, decrease, or terminate its fiscal obligations under, or in connection with, this Contract, County may amend, suspend, decrease, or terminate its obligations under, or in connection with, this Contract. In the event of termination, County shall be liable for payment only for services rendered prior to the effective date of the termination, provided that such services are performed in accordance with the provisions of this Contract. County shall give written notice of the effective date of any suspension, amendment, or termination under this Section, at least ten (10) days in advance.

5.14 CONTRACTOR EMPLOYEE WHISTLEBLOWER RIGHTS AND REQUIREMENT TO INFORM EMPLOYEES OF WHISTLEBLOWER RIGHTS

5.14.1 The Parties agree that this Contract and employees working on this Contract will be subject to the whistleblower rights and remedies in the pilot program on contractor employee whistleblower protections established at 41 U.S.C. § 4712 by section 828 of the National Defense Authorization Act for Fiscal Year 2013 (Pub. L. 112–239) and section 3.908 of the Federal Acquisition Regulation;

5.14.2 Contractor shall inform its employees in writing, in the predominant language of the workforce, of employee whistleblower rights and protections under 41 U.S.C. § 4712, as described in section 3.908 of the Federal Acquisition Regulation. Documentation of such employee notification must be kept on file by Contractor and copies provided to County upon request; and

5.14.3 Contractor shall insert the substance of this clause, including this paragraph (c), in all subcontracts over the simplified acquisition threshold ($150,000 as of September 2013).

5.15 AUDIT REQUIREMENTS:

5.15.1 If the Contractor expends $750,000 or more in a year in federal awards, the Contractor shall have a single audit conducted for that year according to the Single Audit Act of 1984 (Pub. L. No. 98-502) (codified at 31 U.S.C. §§ 7501, *et seq.*), and the Single Audit Act Amendments of 1996 (Pub. L. No. 104-156). The Contractor shall comply

with OMB Uniform Guidance, as applicable. The audit report shall be submitted to the County for review within nine (9) months following the close of the fiscal year. The Contractor shall take any necessary corrective action to remedy any material weaknesses and/or reportable conditions identified in the audit report within six (6) months after the release date of the report. The County may consider sanctions as described in OMB Uniform Guidance for contractors not in compliance with the audit requirements. All books and records shall be maintained in accordance with Generally Accepted Accounting Principles (GAAP).

5.15.2 Comply with the requirement of the Federal Office of Management and Budget ("OMB") Uniform Guidance. The Contractor is responsible for having an audit performed in accordance with, and when required, by OMB Uniform Guidance and for sending a copy of the report issued as a result of the audit to the County within thirty (30) days of issuance. The County reserves the right to engage an auditor, at the Contractor's expense, to perform an OMB Uniform Guidance audit of the Contractor in the event that the Contractor fails to engage an auditor or the County rejects or disapproves of the auditor engaged by the Contractor.

5.16 ISRAEL BOYCOTT:

By submitting this proposal the Contractor certifies that they are in compliance with Article 9, Arizona Revised Statutes Section 35-393 *et. seq*.

ATTACHMENT A

PRICING SHEET

BIDDER NAME: _____

F.I.D./VENDOR #: _____

BIDDER ADDRESS: _____

P.O. ADDRESS: _____

BIDDER PHONE #: _____

BIDDER FAX #: _____

COMPANY WEB SITE: _____

COMPANY CONTACT (REP): _____

E-MAIL ADDRESS (REP): _____

PAYMENT TERMS: BIDDER IS REQUIRED TO SELECT ONE OF THE FOLLOWING:

TERMS WILL BE CONSIDERED IN DETERMINING LOW BID.

FAILURE TO CHOOSE A TERM WILL RESULT IN A DEFAULT TO NET 30.
BIDDER MUST INITIAL THE SELECTION BELOW.

NET 10 _____
NET 15 _____
NET 20 _____
NET 30 _____
NET 45 _____
NET 60 _____
NET 90 _____
2% 10 DAYS NET 30 _____
1% 10 DAYS NET 30 _____
2% 30 DAYS NET 31 _____
1% 30 DAYS NET 31 _____
5% 30 DAYS NET 31 _____

COMPENSATION/FEES:	TOTAL AMOUNT
Healthy Arizona Worksite Program (HAWP) **School Instructional Design Project**	$_____
(As defined herein)	(Please fill in)

Respondent's signature below indicates understanding and agreement to perform the services outlined in the Request for Proposal indicated above for the total amount they have listed above.

_____ _____

Signature (REQUIRED) Date

ATTACHMENT B

PROPOSER REFERENCES

INDIVIDUAL OR FIRM SUBMITTING RESPONSE: _____

1. COMPANY NAME: _____

   ADDRESS: _____

   CONTACT PERSON: _____

   TELEPHONE: ( ) _____

2. COMPANY NAME: _____

   ADDRESS: _____

   CONTACT PERSON: _____

   TELEPHONE: ( ) _____

3. COMPANY NAME: _____

   ADDRESS: _____

   CONTACT PERSON: _____

   TELEPHONE: ( ) _____

ATTACHMENT C

SOLE PROPRIETOR WAIVER

MARICOPA COUNTY RISK MANAGEMENT

222 North Central Avenue, Suite 1110
Phoenix, Arizona 85004

NOTE: THIS FORM APPLIES ONLY TO MARICOPA COUNTY DEPARTMENTS, DISTRICTS, BOARDS, COMMISSIONS AND UNIVERSITIES UTILIZING SOLE PROPRIETORS WITH NO EMPLOYEES. IF YOU ARE CONTRACTING WITH A CORPORATION, LIMITED LIABILITY COMPANY, PARTNERSHIP OR SOLE PROPRIETORS WITH EMPLOYEES, THIS FORM DOES NOT APPLY.

The following is a written waiver under the compulsory Workers' Compensation laws of the State of Arizona, A.R.S. §23-901 (et. seq.), and specifically, A.R.S. §23-961(L), that provides that a Sole Proprietor may waive his/her rights to Workers' Compensation coverage and benefits.

I am a sole proprietor and I am doing business as _____ (name of Sole Proprietor's Business). I am performing work as an independent contractor for Maricopa County. I am not the employee of Maricopa County for Workers' Compensation purposes and, therefore, I am not entitled to Workers' Compensation benefits from Maricopa County.

I understand that if I have any employees working for me, I must maintain Workers' Compensation insurance on them.

Name of Sole Proprietor		**Social Security Number**	**Telephone Number**
Street Address / P.O. Box	**City**	**State**	**Zip Code**
Signature of Sole Proprietor		**Date**	
Maricopa County Department of Public Health:			
Cheryl Rentscheler, Procurement Officer		**Date**	

Both signatures must be present and the completed form submitted by the Procurement Officer to Maricopa County Risk Management, 222 North Central Avenue, Suite 1110, Phoenix, AZ 85004. An authorized Risk Management Representative will sign and return to the Maricopa County Department of Public Health to be maintained in their records.

Signature of Risk Management Representative **Date**

AGREEMENT

The Contractors hereby certify that they have read, understand, and agree that acceptance by Maricopa County of the Contractor's offer by the issuance of a Purchase Order or a Contract will create a binding Contract. Further, they agree to fully comply with all terms and conditions as set forth in the Maricopa County Procurement Code, and amendments thereto, together with the specifications and other documentary forms herewith made a part of this specific procurement.

BY SIGNING THIS AGREEMENT THE SUBMITTING FIRM OR INDIVIDUAL CERTIFIES THAT THEY HAVE REVIEWED THE ADMINISTRATIVE INFORMATION AND CONTRACTUAL TERMS AND CONDITIONS LOCATED AT http://www.maricopa.gov/Materials/default.aspx AND AGREE TO BE CONTRACTUALLY BOUND TO THEM.

INDIVIDUAL OR FIRM SUBMITTING RESPONSE VENDOR REGISTRATION #

PRINTED NAME AND TITLE AUTHORIZED SIGNATURE

ADDRESS TELEPHONE FAX #

CITY STATE ZIP DATE

WEB SITE: _____ EMAIL ADDRESS: _____

MARICOPA COUNTY, ARIZONA

BY: _____
CHERYL RENTSCHELER, DATE
PROCUREMENT OFFICER, PUBLIC HEALTH

BY: _____
KEVIN TYNE, DATE
CHIEF PROCUREMENT OFFICER, MARICOPA COUNTY

APPROVED AS TO FORM:

BY: _____
ATTORNEY FOR MARICOPA COUNTY DATE

EXHIBIT 1

Healthy Arizona
Worksite Program (H

EXHIBIT 2

Course Observation Checklist.docx

Course Observation Checklist

Date:	
Course Title:	
Facilitator:	
Observer:	

In the blank space provided for each section, write any applicable observations.

- Use a + to indicate effectiveness
- Use a – to indicate ineffectiveness
- Use a 0 to indicate that no examples were observed

Formal Presentation

Presenting ideas effectively to individuals or groups when given time to prepare; delivering presentations suited to the characteristics and needs of the audience. A good way to summarize Formal Presentation is to ask, "were the learners able to follow the flow of information?"

	Maintains audience attention – keeps the audience engaged through use of techniques such as analogies, illustrations, humor, an appealing style, body language, and voice inflection.
	Defines clear goals – establishes an objective that clearly reflects the needs of audience.
	Follows a logical sequence – presents main ideas that support the objective of the presentation, and presents facts, evidence, and details that support the main ideas; delivers information in a logical order to aid understanding.
	Uses nonverbal communication – uses body language that is consistent with verbal communication and aids understanding.
	Uses learning aids – uses audio and visual aids to enhance the audience's understanding of content.
	Listens and responds to questions and objections - involves the audience by soliciting questions and input; clarifies as needed to help achieve the goals of the session.
	Summarizes the presentation – summarizes the main ideas; calls the audience to take action or make decisions, where appropriate.

Facilitation of Learning

Creating an environment that fosters learning; using appropriate interpersonal techniques to facilitate learning and gain commitment. A good way to summarize this is to ask, "Where the learners ready and able to apply the unit content/concepts/skills/tools?"

	Uses key principles – establishes good interpersonal relationships by helping people feel valued, appreciated, and included in discussions (enhances self-esteem, empathizes, involves, discloses, supports).
	Uses process skills – checks for understanding, makes procedural suggestions, transitions between topics.
	Champions the unit content/concepts/skills/tools.
	Describe the purpose and importance of the content/concepts/skills/tools.
	Describes the benefits of using the content/concepts/skills/tools on the job.
	Provides clear directions for learning activities and exercises.

Communication

Clearly conveying information and ideas through a variety of media to individuals or groups in a manner that engages the audience and helps them understand and retain the message. A good way to summarize Communication is to ask, "Were the learners engaged and attentive? Did the communication aid understanding?"

	Organizes the communication – clarifies the purpose and importance; stresses major points; follows a logical sequence.
	Maintains audience attention – keeps the audience engaged through use of techniques such as analogies, illustrations, humor, an appealing style, body language, and voice inflection.
	Adjusts to the audience – frames message in line with audience experience, background, and expectations; uses terms, examples, and analogies that are meaningful to the audience.
	Ensures understanding – seeks input from audience; checks understanding; presents message in different ways to enhance understanding.
	Adhere to accepted conventions – uses syntax, pace, volume, diction, and mechanics appropriate to the media being used.
	Comprehends communication from others – attends to messages from others; correctly interprets messages and responds appropriately.

General Notes

Healthy Arizona WORKSITES
A PUBLIC HEALTH INITIATIVE

Healthy Arizona Worksite Program (HAWP)

HAWP 101 Training

ARIZONA DEPARTMENT
OF HEALTH SERVICES

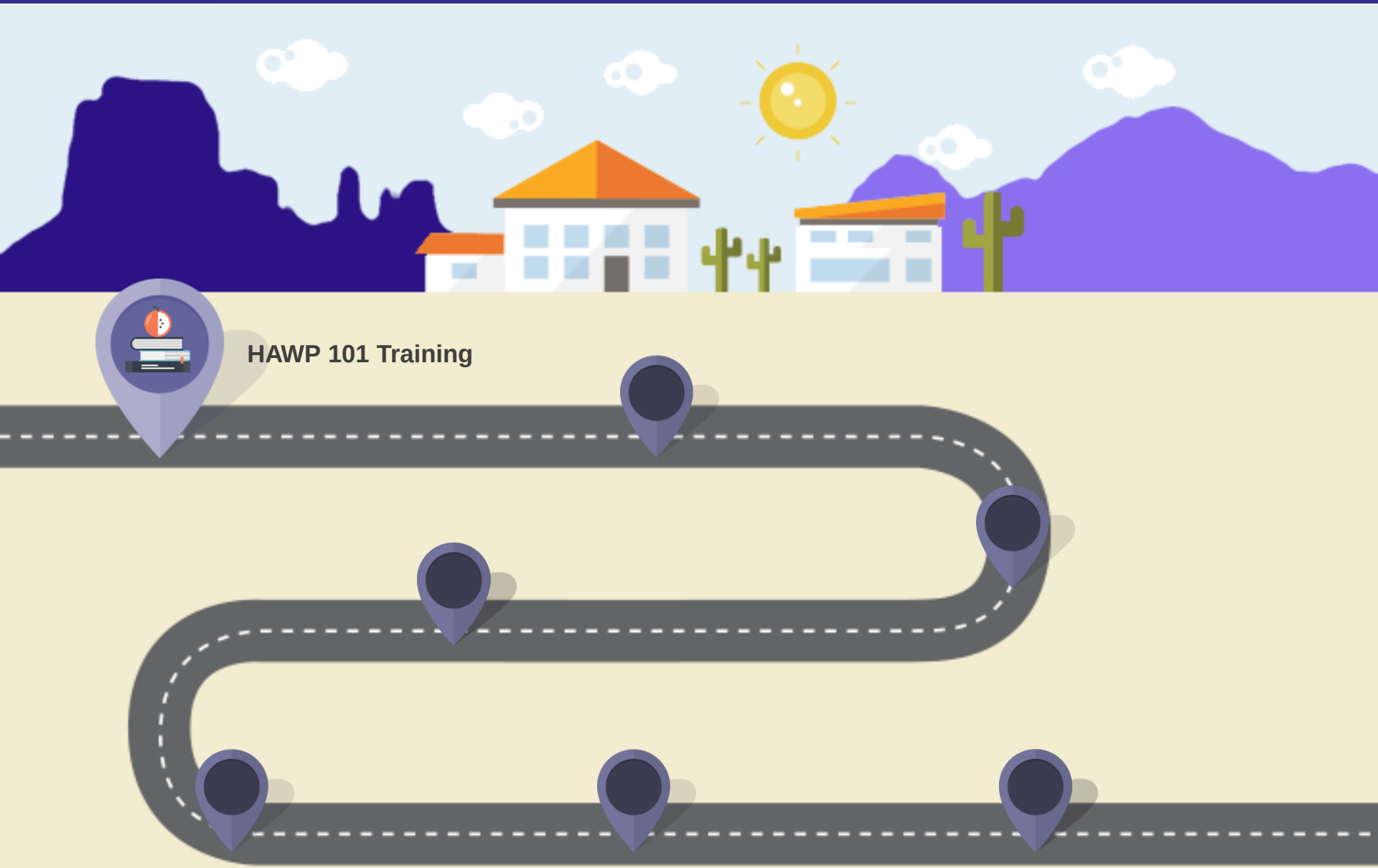
Healthy Arizona Worksites Program (HAWP)

- Free Training
- Technical Assistance
- Evidence-based Comprehensive Worksite Wellness Initiatives
- Networking with others
- Healthy Arizona Worksite Recognition Award!

Healthy Arizona
WORKSITES
A PUBLIC HEALTH INITIATIVE

Roadmap to the HAWP Award

Roadmap to the HAWP Award



HAWP Award Success Story

For more success stories, visit:

healthyazworksites.org/resources/employer-videos/

Healthy Arizona WORKSITES
A PUBLIC HEALTH INITIATIVE

Training objectives

- Articulate the business case for worksite wellness
- Build organizational buy-in
- Develop a worksite wellness program through:
  - + Assessment
  - + Planning and implementation
  - + Continuous evaluation
- Identify tools and resources for ongoing support
- Introduce the Healthy Arizona Worksite Program (HAWP) Award

HAWP Training and Assistance

MODULE 1

BUILDING BUY IN

Identify the value of a comprehensive worksite wellness program and a strong worksite wellness infrastructure

MODULE 2

DATA COLLECTION

Assess your workplace to identify priority areas for intervention

MODULE 3

CREATING YOUR PLAN

Develop, implement, and evaluate your worksite wellness program.

Healthy Arizona ★★★ WORKSITES
A PUBLIC HEALTH INITIATIVE

Healthy Arizona WORKSITES
A PUBLIC HEALTH INITIATIVE

HAWP 101:

Building Buy-in for Worksite Health

The “Healthy Arizona Worksite Program 101 Training” was developed by CDC and Viridian Health Management as part of the CDC National Healthy Worksite Program.

Building Buy-in for Worksite Health

Goal:

Identify the value of a worksite wellness program and the components of a strong worksite wellness infrastructure

Group Activity

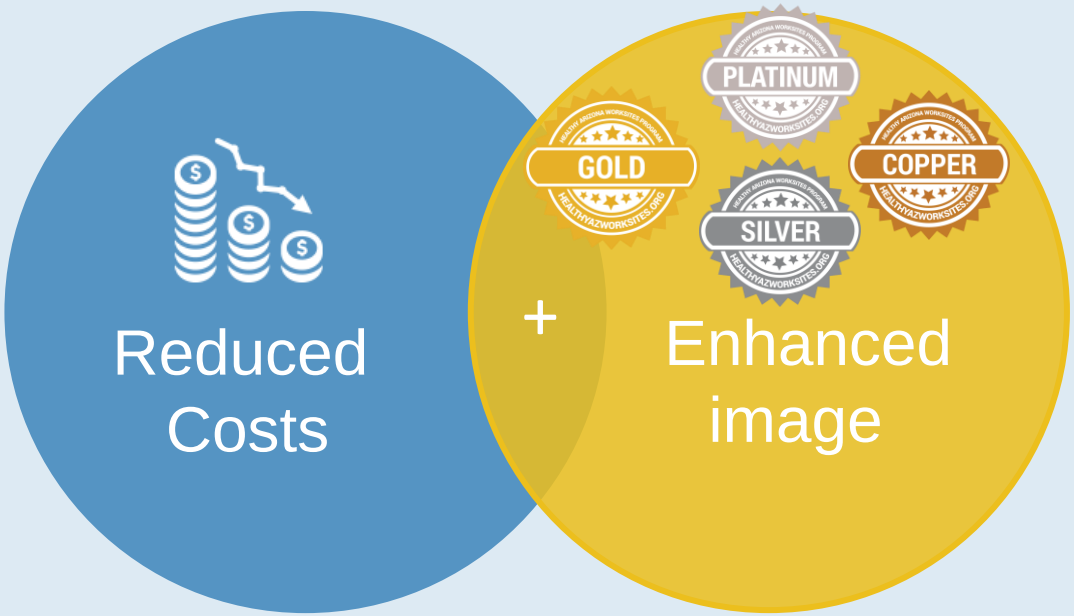
HEALTHY WORKSITE

What does a healthy worksite look like to you?

A Healthy Worksite Culture

- A work environment where:
  - + Employee health and safety is valued, supported and promoted
  - + Leadership implements a comprehensive worksite health program
    - Includes policies, benefits and environmental supports
  - + All levels of the organization are involved
  - + Worksite health program is a routine part of business operations aligned with overall business goals.
  - + Access and opportunities to participate are made available to all employees.

Why Care about Worksite Wellness?



= Happier & Healthier employees

?

Impact of Employee Health

Indirect Costs represent 2-3 times Direct Health-care Costs

The Cost of Tobacco and Physical Inactivity

= $278B

Cigarette smoking was estimated to be responsible for $278 billion in lost productivity due to absenteeism and extra health care costs in the U.S.

= $250

Sedentary employees incur $250 more in annual healthcare costs than moderately active (1–2 times/wk) and very active (3+ times/wk) employees

Gallup-Healthways Well-Being Index; Based on survey data collected Jan. 2-Aug. 23, 2013. www.gallup.com/poll/164651/smoking-linked-278-billion-losses-employers.aspx

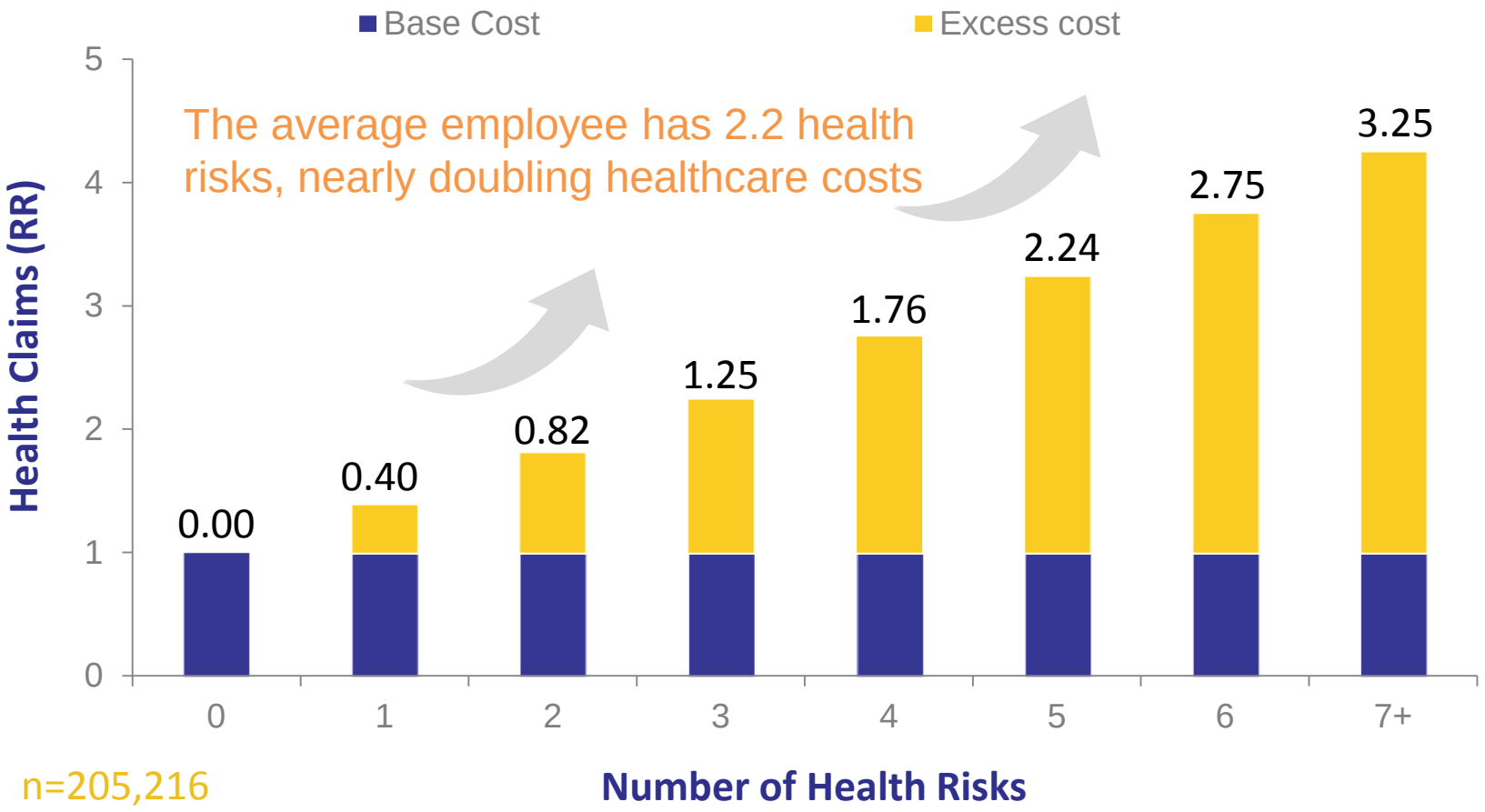
Feifei Wang, Tim McDonald, Laura Champagne, Dee W. Edington. Relationship of Body Mass Index and Physical Activity to Health Care Costs Among Employees. J. Occup Environ Med. 2004; 46(5): 428-436.

*Gates DM, Succop P, Brehm BJ, Gillespie GL, Sommers BD. Obesity and presenteeism: the impact of body mass index on workplace productivity. J Occup Environ Med. 2008;50(1):39-45.

**Finkelstein EA, Trogdon JG, Cohen JW, Dietz W. Annual medical spending attributable to obesity: payer- and service-specific estimates. Health Affairs. 2009;28(5):w822-831.

Healthy Arizona WORKSITES A PUBLIC HEALTH INITIATIVE

Number of Health Risks and Excess Healthcare Claim Cost



Aldana S. Financial impact – literature review. American Journal of Health Promotion. 2001 May/June;15:5.
Burton WN, et al. The association of health risks with on-the-job productivity. Journal of Occupational and Environmental Medicine. 2005;47(8):769-777.
University of Michigan, Health Management Research Center, Cost- Benefit Research Report. 2006 Wright D, et al. Comparing excess costs across multiple corporate populations. Journal of Occupational and Environmental Medicine 2004;46 (9):937-945.
Burton WN, et al. The association of health risks with on-the-job

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A PUBLIC HEALTH INITIATIVE

Number of Health Risks and Other Excess Costs

Productivity Loss

- The average employee had 2.2 health risks, resulting in productivity losses of about $2,000/year
- The average employee takes 3.5 sick days/ year at an excess cost (over persons with no risks) or $272/year

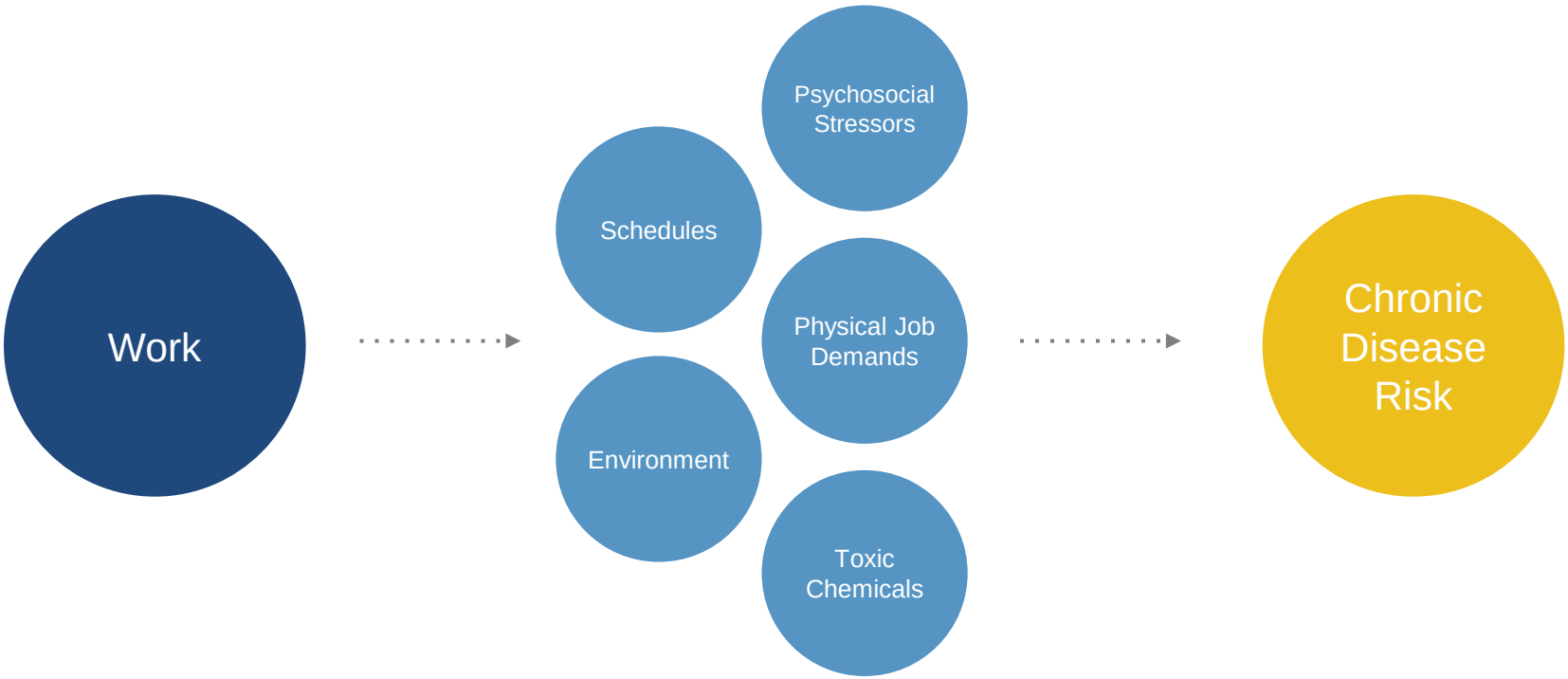
Take-Home Message

More health risks = greater costs in excess claims (medical/ pharmacy), productivity, and absenteeism

What Impacts Health

Worksites can help make the healthy choice, the easy choice!

Work Contributions to Chronic Disease Risk



Job related stress contributes 10-30% of heart disease risk in working people

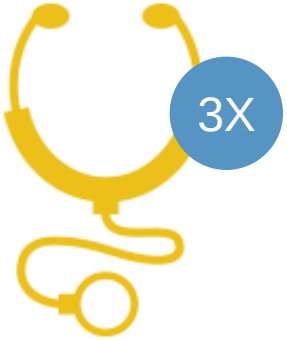
Adapted with permission from Paul Landsbergis, 2012
Center for Promotion of Health in the New England Workplace

Impacts of Job Stress

- 30–40% employees report work as “very or extremely stressful”
- High job stress/strain is associated with
  - + Heart disease, high blood pressure, depression.
  - + Increased risks of being overweight, smoking, heavy alcohol use, and low physical activity.

2012. Work Stress as a Risk factor for Cardiovascular Disease
U.S. National Library of Medicine National Health Institute
http://www.ncbi.nlm.nih.gov/pmc/articles/PMC4523692/

Chronic Disease Impact on Worker's Compensation



Rates of worker's compensation claims with a comorbidity diagnosis (e.g. injury AND hypertension; injury AND diabetes) nearly **tripled from 2000-2009**

Claims with these comorbidity diagnoses are about **2x costlier** than claims without a comorbidity diagnosis

We should reduce injury by promoting a safe and healthy work environment.
But, can we reduce chronic disease as well?

Comorbidities in Workers Compensation. NCCI Research Brief, 2012. Laws, C. and Colon, D.

Impact of a Comprehensive Worksite Health Program

Strong evidence exists for the effectiveness of worksite health programs to positively impact the following:

Tobacco use*

High blood pressure*

High cholesterol*

Dietary fat intake*

Psychosocial work factors**

Musculoskeletal disorders**

Days absent due to illness*

*Task Force Comm. Prev. Serv. 2007. *Proceedings of the Task Force Meeting: Worksite Reviews*.
**Gilbert-Ouimet M, Brisson C, Vezina M, Trudel L, Bourbonnais R, Masse B, et al. Intervention Study on Psychosocial Work Factors and Mental Health and Musculoskeletal Outcomes. *HealthcarePapers,* 2011;(Sp)Vol. 11; 47-66.

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A PUBLIC HEALTH INITIATIVE

Impact of Worksite Health Programs

Maricopa County: Better Bites, Better Gulps (BBBG)

THE ISSUE

- 88% of employees purchase food from vending machines at work
- 70% of employees surveyed wanted to see healthier vending options

THE SOLUTION

- Employer defined healthy food and beverage options and partnered with vendors to supply healthier vending options

The program showed remarkable results:

75% believe their health is valued

+

61% made healthier vending selections

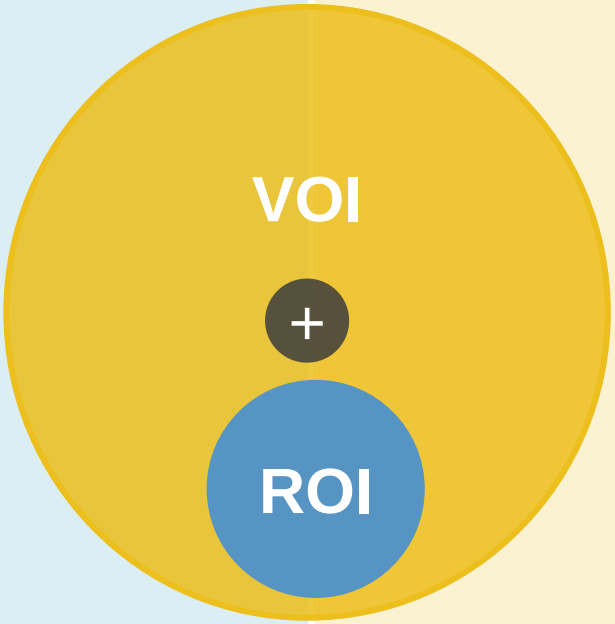
+

Decrease of 5.2 million calories annually

Your Value on Investment

Return on Investment

- Lower health-care cost increases associated with lower employee health risks and improved health status



Value on Investment

- Improved employee health and well-being
- Increased productivity
- Improved employee job satisfaction and retention
- Enhanced employer image in the community, that aids in recruitment of employees
- Reduction in absenteeism and presenteeism

?

Healthy Arizona WORKSITES
A PUBLIC HEALTH INITIATIVE

Letter of Support

- Must come from leadership
- Employees feel empowered with support

Examples:

+ Announcing the wellness program
+ Committed to being involved with HAWP

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A PUBLIC HEALTH INITIATIVE

Worksite Wellness Team

If you want to go fast, go _____.

If you want to go far, go _____.

Why a Wellness Team?

REPRESENTATION IS KEY:

Senior Leaders	All Shifts
Safety Personnel	IT Support
Marketing/Communication	HR liaison
Middle Management	On-site Medical
Human Resources	Spouse/Retirees

What Does a Wellness Team Do?

1. Acts as role models, but are real people.

2. Enables others to participate.

3. Links employee interests and health risk priorities.

4. Meets regularly and share progress with employees.

5. Operates best with effective leadership.

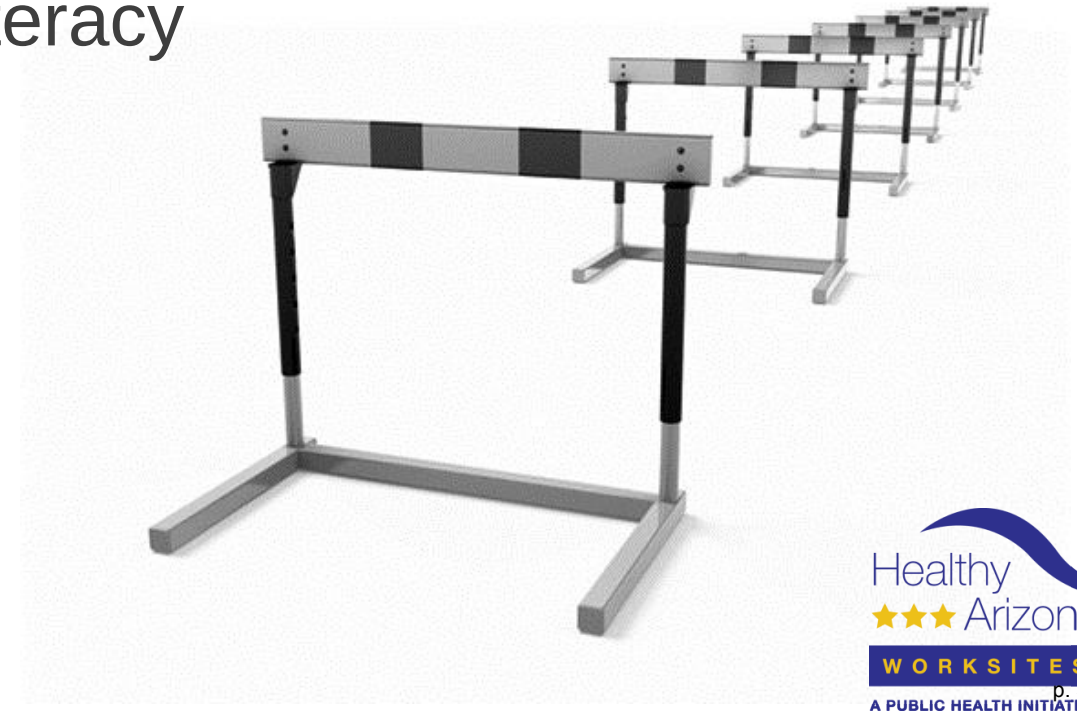
TIPS:

- Identify co-leaders
- Rotate roles
- Communicate

Wellness Team Builds Leadership Buy-in

Wellness Team Identifies/ Addresses Participation Barriers

- Convenience/availability to all employees
- Lack of time
- Lack of manager support
- Confidentiality concerns
- Language and literacy



Roadmap to the HAWP Award

Group Activity

YOUR ELEVATOR PITCH

Imagine that you are stepping into an elevator, going from the first floor to the twentieth in your building. The CEO or decision maker you want to pitch walks in with you, and here is your chance. You have to keep your pitch brief, but compelling. What will you say?

Healthy Arizona WORKSITES
A PUBLIC HEALTH INITIATIVE

HAWP 101:

Data Collection

The “Healthy Arizona Worksite Program 101 Training” was developed by CDC and Viridian Health Management as part of the CDC National Healthy Worksite Program.

HAWP Training & Assistance

MODULE 1

BUILDING BUY IN

Identify the value of a comprehensive worksite wellness program and a strong worksite wellness infrastructure

MODULE 2

DATA COLLECTION

Assess your workplace to identify priority areas for intervention

MODULE 3

CREATING YOUR PLAN

Develop, implement, and evaluate your worksite wellness program.

Healthy Arizona Worksites
A PUBLIC HEALTH INITIATIVE

Data Collection

Goals

Understand the purpose and process of assessing your workplace to identify priority areas for intervention.

Workplace Health Model

Buy-in at the leadership level and throughout the organization

1. BUY-IN

Continuous Quality Improvement

2. ASSESSMENT

Organizational policies, and individual needs and interests

3. PLANNING & IMPLEMENTATION

Health benefits, programs, policies, and environmental supports

4. EVALUATION

Employee satisfaction and productivity, health outcomes, culture of health, etc.

Why Do We Collect Data?

1. A necessary first step that drives planning, resource allocation, implementation, and evaluation

2. Identifies potential opportunities to improve or address health and safety risk factors.

3. Helps to identify the current picture of worksite health as well as ways to improve it.

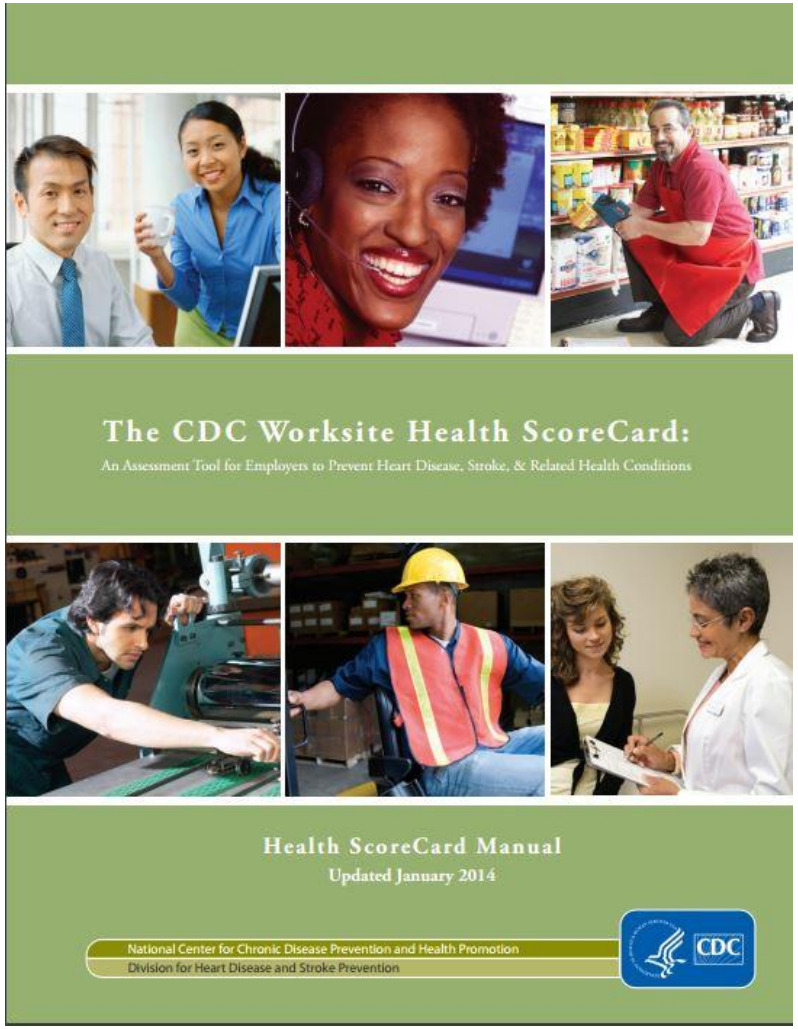
4. Results can be linked to organizational performance.

Assessments: Worksite & Employees

Success = Worksite opportunity + Employee Needs + Employee Interests

Healthy Arizona WORKSITES
A PUBLIC HEALTH INITIATIVE

CDC Worksite Health ScoreCard (HSC)



- Guides the development of a comprehensive worksite health promotion program
  - + Evidence-based individual risk reduction programs
  - + Environmental supports for healthy behaviors
  - + Organizational policies and healthy worksite activities
- Validated worksite tool
- Allows for comparisons with other worksites

Healthy Arizona ★★★ WORKSITES
A PUBLIC HEALTH INITIATIVE

CDC Worksite Health Scorecard

- Organizational Supports
- Tobacco control
- Nutrition
- Physical activity
- Weight management
- Stress management
- Depression
- High blood pressure
- High cholesterol
- Diabetes
- Signs and symptoms of heart attack and stroke
- Emergency response to heart attack and stroke
- Lactation support
- Occupational health and safety
- Vaccine preventable disease

Group Activity

Using the CDC ScoreCard

- How easy or difficult is it to complete the Score Card?
- What questions could you not answer that would require input from HR or another source?
- How helpful was the comparison to the average scores?
- How might this Score Card inform potential areas of improvement to make your worksite healthier?

CDC Worksite Health ScoreCard (HSC)

TOPIC	TOTAL PTS POSSIBLE	AVERAGE SCORES*				
		OVERALL	VERY SMALL	SMALL	MEDIUM	LARGE
Organizational Supports	34	24	21	21	24	27
Tobacco Control	23	13	11	10	13	16
Nutrition	21	10	8	8	11	12
Physical Activity	23	13	9	10	15	16
Weight Management	11	8	5	6	8	9
Stress Management	14	10	9	8	11	11
Depression	19	9	6	9	7	10
High Blood Pressure	17	10	8	10	10	12
High Cholesterol	17	10	8	9	9	12
Diabetes	15	9	7	8	9	11
Signs and Symptoms of Heart Attack and Stroke	4	2	2	2	2	2
Emergency Response to Heart Attack and Stroke	17	11	7	12	11	13
Total	215	129	99	112	129	153

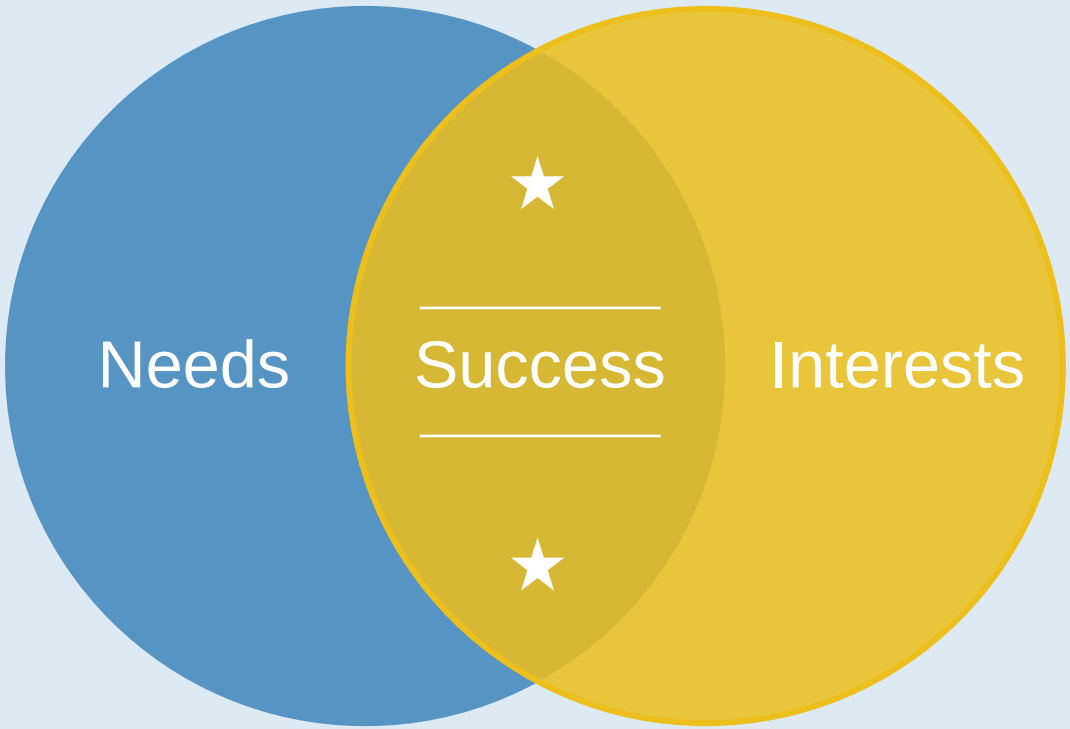
*The CDC Worksite Health ScoreCard uses the following worksite-size categories: very small (10-99 employees); small (100-249); medium (250-749); and large (750+).

Worksite Sizes:

- Very small: 10-99 employees
- Small: 100-249
- Medium: 250-749
- Large: 750+

Healthy Arizona WORKSITES
A PUBLIC HEALTH INITIATIVE

Assessments: Worksite & Employees



How to Measure Worksite Opportunity

- CDC Scorecard

How to Measure Needs

- Health Risk Assessment
- Biometric Surveys

How to Measure Interests

- Employee Interest Survey
- Management Surveys
- Culture Surveys
- Focus groups/ interviews

Success = Worksite opportunity + Employee Needs + Employee Interests

Healthy Arizona WORKSITES
A PUBLIC HEALTH INITIATIVE

Balancing Interest and Need

Interest counts, but usually need takes priority

- Example: Company X has identified that 85% of employees do not meet physical activity recommendations, and interest is also very low
- The company chose to address this problem by:
  - + Implementing a flex-time policy to encourage physical activity, organizing a walking club, and improving their stairwells.
  - + Raising interest in physical activity through regular communications, coworker success stories, and a team competition.

Balancing Interest and Need

Interest counts, but usually need takes priority.

CAVEAT: *If your organization is just starting your wellness program and/or you are having a tough time getting buy in from employees, consider prioritizing low-hanging fruit (i.e. interests)*

Data Collection Best Practices

1. Provide multiple modes for people to participate (e.g. offering online and paper/pencil surveys).

2. For in-person discussions, share interview questions ahead of time so they can prepare.

3. Try to identify barriers to participation.

4. Collect data as frequently as possible but don't collect data you don't intend to use.

5. Stress confidentiality and ensure you are HIPAA compliant (NEVER release individual data).

6. Share aggregate results (to increase buy in).

7. Objectively report data and keep reports straightforward and relevant.

Healthy Arizona Worksites
A PUBLIC HEALTH INITIATIVE

Group Activity

TOP PRIORITY AREA(S)

Balancing interests and needs can lead to great success.

Roadmap to the HAWP Award

Healthy Arizona WORKSITES

A PUBLIC HEALTH INITIATIVE

HAWP 101:

Creating Your Worksite Health Improvement Plan (WHIP)

The “Healthy Arizona Worksite Program 101 Training” was developed by CDC and Viridian Health Management as part of the CDC National Healthy Worksite Program.

HAWP Training and Assistance

MODULE 1

BUILDING BUY IN

Identify the value of a comprehensive worksite wellness program and a strong worksite wellness infrastructure

MODULE 2

DATA COLLECTION

Assess your workplace to identify priority areas for intervention

MODULE 3

CREATING YOUR PLAN

Develop, implement, and evaluate your worksite wellness program.

Healthy Arizona Worksites
A PUBLIC HEALTH INITIATIVE

Creating Your Worksite Health Improvement Plan

Goal

Learn how to plan, implement, and evaluate your worksite health program.

Workplace Health Model

Buy-in at the leadership level and throughout the organization

1. BUY-IN

Continuous Quality Improvement

Organizational policies, and individual needs and interests

2. ASSESSMENT

3. PLANNING & IMPLEMENTATION

Health benefits, programs, policies, and environmental supports

4. EVALUATION

Employee satisfaction and productivity, health outcomes, culture of health, etc.

Worksite Health Improvement Plan Vision

Vision Statement

- Ideally aligned with the strategic plan of your organization
- Represents the highest level of *impact* you hope to achieve in 5-7 years
- Assess impact upon changes in health outcomes and business goals

Sample: *"To create a worksite that supports employees to engage in healthy behaviors that contribute to the prevention and management of chronic conditions.*

Healthy Arizona Worksites
A PUBLIC HEALTH INITIATIVE

WHIP Goals

Your **Goals** support the overall vision

- Progress can be measured through:
  - + Long-term outcomes
  - + Intermediate outcomes
- Often achieved in 3-5 years

Examples:

1. Support employees in achieving the recommended amount of **physical activity**
2. Support employees in eating **healthy foods** and beverages

Healthy Arizona WORKSITES
A PUBLIC HEALTH INITIATIVE

WHIP Objectives

Objectives describe the steps that will take place to achieve the behavior change described by your goals

SPECIFIC

Clearly written to avoid different interpretations

MEASURABLE

Monitor and evaluate progress toward achieving the result

APPROPRIATE

Makes sense in context of worksite, considers obstacles or issues to address

REALISTIC

Achievable within time allowed and resources available (set yourself up for success!)

TIME BOUND

With a specific time period for completion

TIP:
Make sure your objectives are SMART.

Adapted from: Management Sciences for Health. “Managers who lead.” 2005.

Worksite Wellness Objectives

Examples:

30%

1. By March 2017, 30% of employees will engage in at least 5,000 steps per day each week.

1… 2… 3…

2. By March 2017, identify and implement at least three strategies that will increase adherence to more nutritious food choices.

Healthy Arizona Worksites
A PUBLIC HEALTH INITIATIVE

Writing the Worksite Health Improvement Plan

What is wrong with this objective?

OBJECTIVE:

Increase participation in the health assessment.

SMART OBJECTIVE:

Increase employee participation in the health assessment from 30% to 50% by 12/31/2016.

Healthy Arizona Worksites
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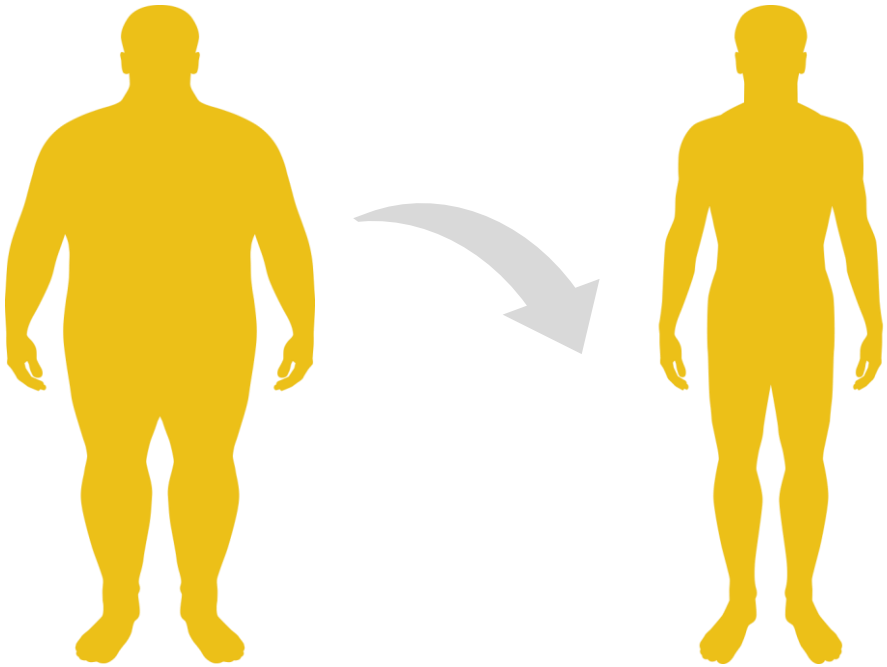
Writing the Worksite Health Improvement Plan

What is wrong with this objective?

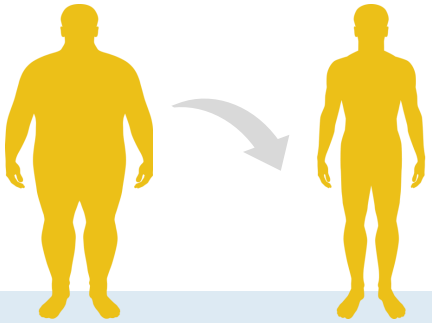


OBJECTIVE:

Decrease the rate of employee obesity to zero in two years.

Worksite Health Strategies

- What are you going to do to achieve your objectives?
- Areas for consideration:
  - + Driven by data collection and assessment
    - Address most common or costly health risk or lifestyle factors
    - Employee interests
  - + Budget/Time constraints
  - + Management expectations for the worksite health program
  - + Effective and science-based



OBJECTIVE:

Decrease the rate of employee obesity by 25% in two years.

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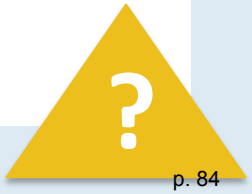
Types of Worksite Health Interventions

Programs	• Support for individual health behaviors • Individual health coaching/counseling; health classes
Policies	• Formal or informal statements to protect employee health • Tobacco-free campus; health food policies
Environmental Support	• Physical factors that foster healthy choices • Stairwell enhancement; walking paths
Health Plan Design	• Strategy to impact key risks and cost drivers by influencing behavior change • Gym membership discounts/subsidies



Group Activity

CREATE YOUR WORKSITE HEALTH IMPROVEMENT PLAN (WHIP)

Plan for ABC Digital Strategies

Case Study: Creating the WHIP

Vision Statement for ABC Digital Strategies

- Ideally aligned with the strategic plan of your organization
- Represents the highest level of *impact* you hope to achieve in 5-7 years
- Assess impact upon changes in health outcomes and business goals

Sample: *"To create a worksite that supports employees to engage in healthy behaviors that contribute to the prevention and management of chronic conditions.*

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Case Study: Creating the WHIP

Goal statements for ABC Digital Strategies

- What is the desired state or outcome for this priority area?
- What are we trying to achieve?
- What do we need to do in this priority area to significantly change the current state and move toward a desired state?

e.g. Support employees in achieving the recommended amount of physical activity consistent with the American Heart Association 2015 recommendation

e.g. Support employees in eating a healthy diet consistent with the 2010 USDA dietary guidelines

e.g. To support employees to achieve work-life balance to improve health and well-being, and reduce stress

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Case Study: Creating the WHIP

Objective statements for ABC Digital Strategies

- Address:
  - + Who are we going to target with these objectives?
  - + What is the change we want to see?
  - + How much change is realistic in the established time frame?
  - + By what date(s) will we be able to achieve these objectives?
- Objectives must be SMART (specific, measurable, achievable, realistic, timely)

e.g. By December 2017, 30% of employees will engage in at least 5,000 steps per day each week.

e.g. By December 2017, identify and implement at least 3 strategies to increase adherence to more nutritious food choices

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Case Study: Creating the WHIP

Objective statements for ABC Digital Strategies

Physical Activity

By [date], [percent] of employees will engage in at least 30 minutes of physical activity [number] days a week.

Nutrition

By [date], identify and implement at least [number] strategies to promote healthy food and beverages.

Stress

By [date], implement at least [number] policies that support at least [percent] employees in managing their stress.

Case Study: Creating the WHIP

Programs	• Support for individual health behaviors • Individual health coaching/counseling; health classes
Policies	• Formal or informal statements to protect employee health • Tobacco-free campus; health food policies
Environmental Support	• Physical factors that foster healthy choices • Stairwell enhancement; walking paths
Health Plan Design	• Strategy to impact key risks and cost drivers by influencing behavior change • Gym membership discounts/subsidies

Case Study: Creating the WHIP

Further detailed planning for strategies to support the worksite health improvement plan goals and objectives

1. How you will implement the strategies
2. Roles and responsibilities for team members
3. Timeline for each activity
4. Resources needed (financial and nonfinancial)
5. Communication strategies
6. Data sources and evaluation strategies

Health Improvement Planning Process

OBJECTIVE (What?)	DATE (When?)	STRATEGY (What?)	PROCESS (How?)	RESPONSIBLE PARTY	EVALUATION (Who? What? By When?)
70% or more of our employees will complete the health assessment (HA) by 1/5/15.	By 1/5/15	Conduct free health assessment for all employees.	Outside vendor to distribute and collect HA at employee meetings between shifts.	Tom Smith ABC Consulting	• # of participants • "Satisfaction" survey • Aggregate data
At least 90% of employees with at least one cardiac risk factor will increase their knowledge of preventing cardiovascular disease by 2/2/15	By 2/2/15	Healthy Heart campaign during Heart Month	Healthy cooking demonstration and health education activity for all shifts on meal break.	Jane Doe to identify American Heart Association resource to come onsite.	• "Pre & Post" knowledge survey • Satisfaction Survey

What is Evaluation?

- Evaluation examines and assesses a program to improve its effectiveness.
- Evaluation should be considered at all stages of program development.
- Types of program evaluation:
  - + Process Evaluation
    - What are we doing and how well are we doing it?
  - + Outcome Evaluation
    - Are our efforts making a difference in the short, mid-, and long-term?

Key Process Evaluation Questions

1. What activity was implemented?

2. How much did it cost?

3. Who did it impact?

4. Was it implemented the way you planned?

Examines:

1. Steps and activities taken in implementing a program
2. How well the program was carried out
3. Problems and barriers encountered

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Outcome Evaluation

Outcomes are the desired changes that the program will accomplish.

SHORT & MID-TERM MEASURES

- Improvement in health behaviors.
- Increased readiness to change.

LONG-TERM MEASURE

- Reduction of chronic disease.
- Lower health-care costs.
- Improved productivity and reduced absenteeism.
- Fewer disability claims.
- Organizational change (culture of health)

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Importance of Baseline Data

Allows comparison over time to measure program success. To ensure a baseline:

Design evaluation plan BEFORE the program begins.

Collect process and outcome measures at the beginning of the program to establish baseline (even if outcome changes are not expected for a while).

Baseline Data and Benchmarks

Evaluate data against risk factor and organizational benchmarks

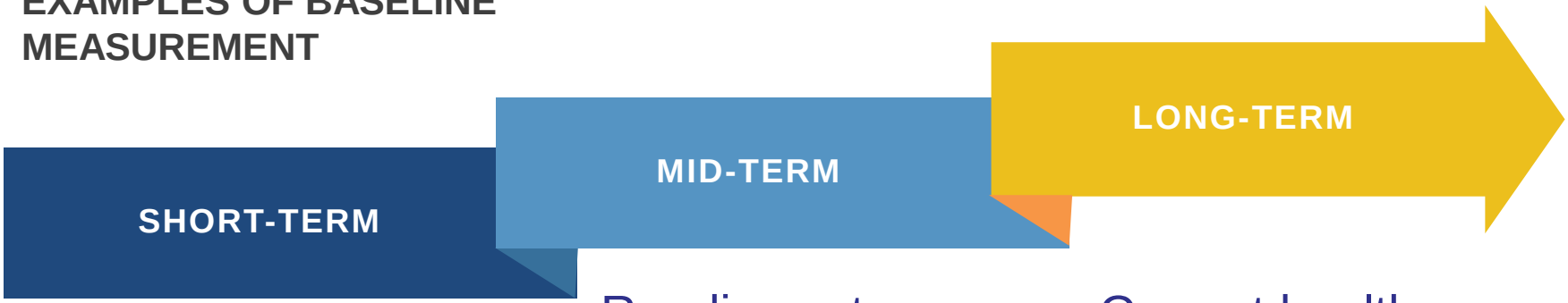
Against national, state, county data

Against industry norms

Year-one data compared to identical follow-up data

Establishing Baseline Data

EXAMPLES OF BASELINE MEASUREMENT



Current program awareness

- Current % of employees who are aware of worksite health program

Readiness to change

- Current % of employees who are ready to change or make healthy changes
- Employee's intent and optimism about making changes

Current health status of employees

- Current % of employees who use tobacco
- Current % of employees who have hypertension

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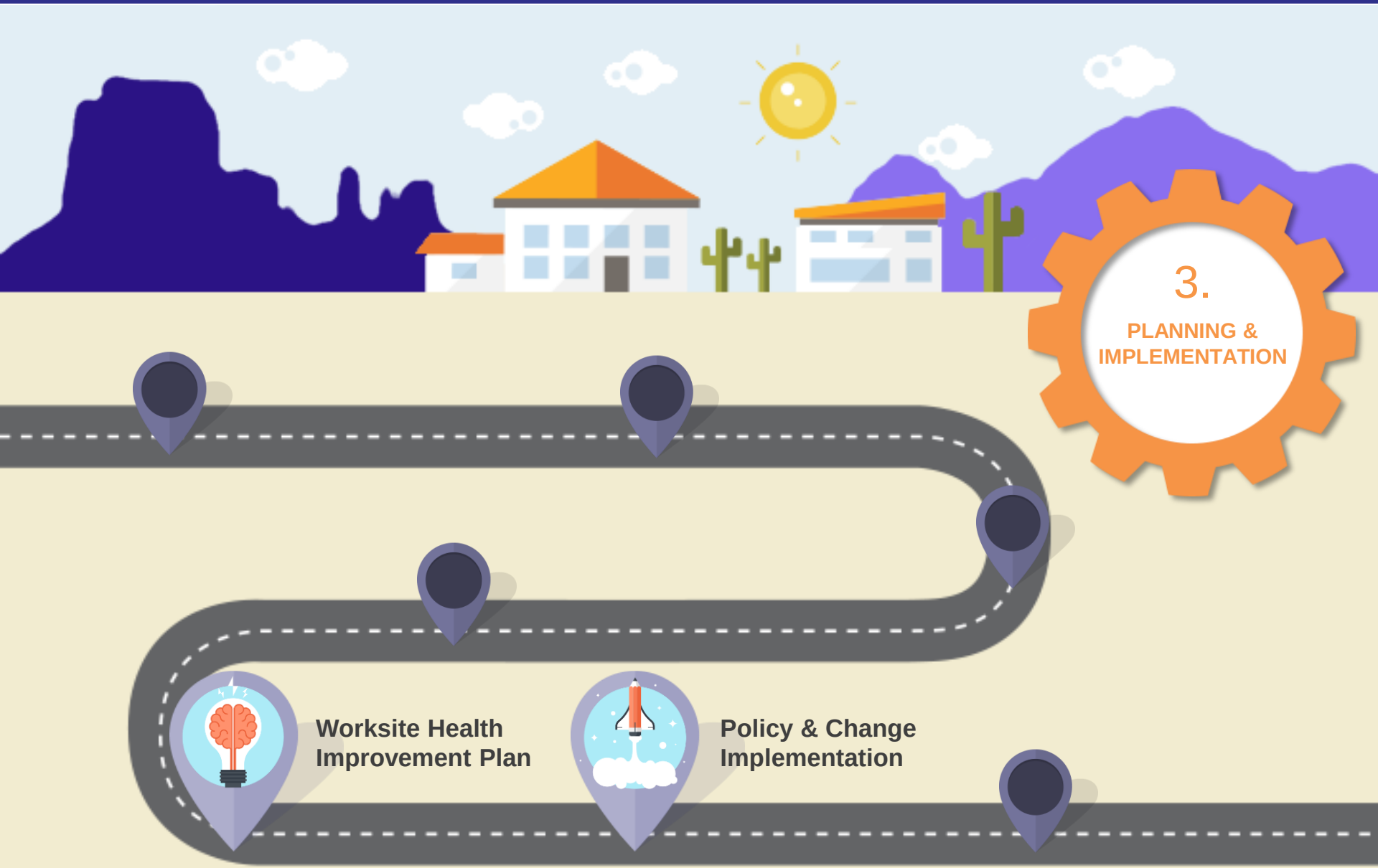
Roadmap to the HAWP Award



Setting Reasonable Expectations

- Creating a healthy worksite culture and changing individual behaviors take time
- Expectations should be based on:
  - **Difficulty** (e.g. increasing the % of people who know their cholesterol numbers is much easier than losing weight or quitting smoking)
  - **Financial resources** dedicated to the worksite health initiative
  - **Policies/environmental changes** to support behavior change
  - **Benefit plan design** and incentive plan
  - **Personnel** necessary to develop and maintain the program

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Worksite Health Program Budget

- Estimates suggest that a reasonable investment in comprehensive worksite health programs is at least $150 per employee per year.
- Develop your budget based on your program needs, don't design your program to fit your budget.
- Prioritize budget expenses based on what will add the most value.

Possible budget items:

+ **Data Collection**
+ **Interventions**
+ **Environmental changes**
+ **Policies**

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Potential Low-Cost Resources

- Centers for Disease Control and Prevention (CDC)
- Local/County/State public health departments
- County extension offices
- Local wellness councils or coalitions
- Local hospitals and colleges
- Health and human service agencies (American Cancer Society, American Heart Association, etc.)
- Health and fitness clubs
- Coworkers

Program Success Factors

1. Encourage senior management participation.

2. Catch people doing well — showcase success.

3. Leverage worksite health champions to promote program.

4. Use committee to be creative and innovative.

5. Don't reinvent the wheel — use existing worksite health resources.

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Roadmap to the HAWP Award

Healthy Arizona WORKSITES

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HAWP 101:

Thank you!

The “HAWP 101 Training” was developed by CDC and Viridian Health Management as part of the CDC National Healthy Worksite Program.

Question and Answers for Bid #PH RFP 171180 - Healthy Arizona Worksite Program (HAWP) Schools Instructional Design Project

Overall Bid Questions

There are no questions associated with this bid.