



**WELLNESS
TEAM LEADER
NOTEBOOK**

Team Leader Notebook Table of Contents

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RESOURCES

Team Roles and Responsibilities

Team

Team Leader

**Action Plan Advisor and
County Resource Person**

Tan - Section 1

Team

A team is any given number of participants involved in developing and implementing a wellness program. A team is responsible for:

1. Developing an Action Plan with goals and objectives, based on the assessed need of a designated community, business, school or other targeted group for the year.
2. Planning and deciding meeting schedules – how often, where and when.
3. Selecting a Team Leader.
4. Designating a secretary whose primary responsibility is to prepare and distribute meeting minutes to the members for team file. The secretary also confirms all meeting arrangements such as place, time; special needs (i.e. audiovisual equipment, copies of document, refreshments, etc.)
5. Assigning team members to different tasks (i.e. budget, education, public relations, activities, assessment and evaluation).
6. Creating and developing an interest in the community in promoting wellness.
7. Serving as a role model by adhering to healthy lifestyles.
8. Implementing activities as planned for the year.

Team Leader

A team leader coordinates, organizes, and guides his or her group in the direction that the team has chosen. A team leader is a vital component in the development of a cohesive team. A team leader is responsible for:

1. Collaborating with the team secretary and other team members in assessing the progress of the Action Plan and scheduling meetings. Reporting may include the meeting minutes, periodic reporting, newsletters and/or other pertinent materials related to the Action Plan.
2. Managing implementation of the Action Plan.
3. Overseeing that the designated tasks/activities are accomplished in accordance with the projected deadlines.
4. Insuring communication between team members.
5. Supporting team members in completion of their responsibilities.
6. Attending Team Leader Meetings.
7. Serving as liaison to the Action Plan Advisors.

Action Plan Advisor

An Action Plan Advisor (APA) plays an important role in assisting teams to develop their Action Plans. The Action Plan Advisor:

1. Provides support and guidance to teams in the development of their Action Plan.
2. Reviews the teams Action Plan.
3. A resource is someone whom you can turn to:
 - as a source of information
 - when in need of help
 - for support during difficult times
 - when you need to brainstorm
 - when you need other resources (i.e. speakers)
 - when you're not sure and they're there!

County Resource Person

A County Resource Person is a County UNH Cooperative Extension staff person responsible for providing information and resources to teams during the year as needed and requested by the team. The County Resource Person work closely to assist with wellness teams around the state of NH.

Survey Tools

(5 Examples)

Wellness Skills and Interest Survey

Employee Wellness Survey

Blue – Section 2

Wellness Programming

Materials for Planning Local Wellness Programs

Personal Wellness Wheel

Model Community Wellness Program

Green – Section 3

Materials for Planning Local Wellness Programs

Planning Materials:

To help teams draft these **Action Plans**, we have attached a background document called “Planning A Local Wellness Program”. It presents three key planning goals:

- A Develop The Foundation
- B Develop The Wellness Project
- C Summary Of The Evaluation Process

The document then lists examples of activities leading to accomplishment of these goals and their related sub-goals. The lists are by no means exhaustive, and we hope teams will identify others. In addition, we expect that teams will choose just a few activities to reach each goal, which are appropriate to their local community.

Team leaders should send in completed Action Plan to:

NH Celebrates Wellness, PO Box
617, Concord, NH, 03302

Planning a Local Wellness Program Overview Of Key Goals

A Develop The Foundation

- (1) Build a well-functioning team.
- (2) Obtain support from a variety of community organizations, school administration staff or students, and businesses.

B Develop The Wellness Project

- (1) Assessment Activities
- (2) Education/Information
- (3) Wellness Activities
- (4) Wellness Resources

C Summary Of The Evaluation Process

- (1) Keep records of how well the team is functioning.
- (2) Maintain records of availability of support from community organizations, school administration, staff or students, and businesses.
- (3) Maintain records of project activities carried out.
- (4) Evaluate the impact of project activities on individual and organizational or community well being.

A - Develop The Foundation

The following are just possible tasks; the teams may of course identify others.

(A-1) **Build A Well-Functioning Team:**

Before you develop team goals:

- Take time to get acquainted with the team by asking questions such as:
 - “Why did you join the Team?”
 - “What do you hope to gain from this experience?”
 - “What areas of wellness are you interested in?”
 - “What talents do you have that you would be willing to share?”
 - “How much time can you commit to the team’s efforts?”
- Take time to brainstorm, write down, and post some norms and guidelines as to **“How Do You Want To Work Together To Assure Success?”**
- Take time to discuss **“How should we handle conflicts, differences in the group so as to assure success?”**
- As team leader, be sure to delegate, share ownership of all challenges and successes with all team members. **DO NOT** assume full responsibility for the success of the team.
- Establish a mission statement or list goals teams will work towards.
- Complete **Action Plan**.
- Assign roles to team members (i.e. team leader, secretary, someone to complete and send in team summary reports after event, etc.)
- Identify new roles as needed and recruit appropriate new members.
- Assure broad representation on teams commensurate with the setting for your wellness programs (management, interested staff, human resources, safety, marketing, community health, human service and recreational organizations, local businesses, civic groups, educational institutions, staff groups and student organizations).
- Retain and replace members.
- Schedule regular meetings throughout the year; keep minutes and records and achieve high attendance at meetings.
- Communicate with all involved: organizational departments, employees, community organizations, businesses, managers/administrators and students.

- Work with other teams.

(A-2) Obtain Support:

- Obtain budget from your school, business or community organization.
- Institute fund-raising activities, including special events such as:
 - ♥ Ruffling off a “wellness quilt”, whose squares have healthy motifs.
 - ♥ Organizing a craft fair with health oriented booths and items that publicize wellness such as mugs, jackets, visors, etc.
 - ♥ Other joint fitness/education/fund-raising activities as “Pennies By The Inch” walk-a-thon, benefit supper with healthy menus, etc.
 - ♥ See Guidelines for Fund Raising and Fund Raising Ideas for Local Teams.
- Work for adoption of a wellness policy within sponsoring community organizations, schools or businesses.
- Include activities for board and administration of sponsoring community organizations, schools or businesses.
- Build coalitions with employees, staff of schools, businesses or community organizations (i.e. organizations participating in planning and providing funds).
- Build coalitions with various organizations and age groups (i.e. wide variety of community organizations represented on team, participating in activities, sponsoring the wellness project including intergenerational activities).
- Building coalitions with community members (i.e. local businesses, civic and youth organizations represented on team, participating in activities, sponsoring the wellness project).

B - Develop The Wellness Project

(B-1) Assessment Activities (Health Risk Appraisal and feedback from community organizations, school staff and students):

- Survey interests and needs of your target audience.
- Conduct focus groups and key leader interviews.
- Conduct lifestyle inventories with community members, seniors, school staff and

students, if applicable.

- Take a personal and family history.
- Conduct Health Risk Appraisals (HRA's).
- Conduct blood pressure screenings.
- Conduct laboratory screenings.
- Conduct nutritional analyses (i.e. individuals could assess a week of family and individual meals).
- Organize special events (i.e. community/school health screenings, health fairs).
- Request that team members make a community "wellness profile" (surveying numbers of vending machines, air quality, smoke-free restaurants, safe walking areas and available fitness programs).

(B-2) Education/Information:

- Conduct lectures on topics such as: health awareness, nutrition, substance abuse, environmental health, self-care, consumer issues, cholesterol, cancer prevention, positive self-image ("Health starts from the inside").
- Provide skill development workshops on such topics as: nutrition analysis of meals, salt-free cooking, self-care, CPR, emergency care, biofeedback, time management, lower back exercises, stress management, home injury prevention strategies, and medication education clinics.
- Information such as: newsletters, bulletin board, posters, movie series, payroll inserts, and provision of a health promotion library.
- Organize special events involving your sponsoring organization and the community such as:
 - ♥ stress relief day
 - ♥ health fair
 - ♥ community plays with humorous theme regarding health habits
 - ♥ book fair promoting wellness with an author present if possible
 - ♥ nutrition week
 - ♥ fruits/vegetables of the season sale with a nutritionist present to provide information on the nutritional value of the foods
 - ♥ safety awareness/injury prevention week

- ♥ smoking cessation

(B-3) Wellness Activities:

- Organize special events involving your sponsoring organization and community. Some can be used as a fund-raising component such as:
 - ♥ family fun run
 - ♥ square dance
 - ♥ bike or hike for health
 - ♥ cross-country skiing
 - ♥ Pennies By The Inch walk-a-thon
 - ♥ Wellness Week: smoking cessation, Health-wise self-care programs, wellness breakfast, flu shots, CPR training
 - ♥ Poker walk
 - ♥ Community supper with healthy menus
 - ♥ Healthy Cooking Cook-Off (include healthy recipe swapping/cookbook)
- Provide fitness testing.
- Promote individual fitness activities (swimming, walking).
- Provide team sports and fitness classes:
 - ♥ bowling
 - ♥ cross-country skiing
 - ♥ golf
 - ♥ pool
 - ♥ softball
 - ♥ tennis
 - ♥ aerobics
 - ♥ chair aerobics
 - ♥ tai chi
 - ♥ strength training
 - ♥ yoga

(B-4) Wellness Resources:

- Provide a health and wellness services resource listing.
- Develop an employee assistance program with counseling available on: drug and alcohol abuse, emotional distress, family problems, financial problems, separation and loss, career assessment.

C - Summary Of The Evaluation Process

(C-1) Maintain Records Of How Well The Team Is Functioning:

- Existence of a completed **Action Plan**.
- Existence of a completed **Mission Statement** or **List of Goals**.
- Team members carrying out specific roles.
- Heterogeneity of team membership.
- Length of service of members and time needed to find replacements.
- Percent of activities performed in time specified in plan.
- Availability of meeting minutes and records.
- Frequency of meetings.
- Attendance at meetings.
- Documented communication with various involved community groups.
- Documented exchanges with other teams.

(C-2) Maintain Records Of Availability Of Support From Targeted Groups/Organizations:

- Size of budget.
 - Number of fund-raising activities.
 - Amount of funds raised.
 - Number of employees, community organizations, managers/administrators, and students participating in fund-raising.
 - Existence of a wellness policy within sponsoring organizations.
 - Number of employees, community organizations, businesses, managers/administrators and students represented on team, participating in activities and sponsoring the wellness team activities.

(C-3) Maintain Records Of Project Activities Carried Out

- Complete the **Project Summary Report Form** after completing each team project!
- Numbers and types of activities.
- Numbers of employees, community organizations, individuals, businesses and managers/administrators and students participating, lessons learned.
- Publicity in local media and printed materials.

(C-4) Evaluate The Impact Of Project Activities On Individual and Community Well-Being:

- Percent of employee population, community residents or specific target group who exercise at target heart rate three times per week.
- Percent of employee population, community residents or specific target group who smoke, or count those who have stopped.
- Pre and post tests for specific organizational or community educational programs.
- Documented increase in healthy lifestyle behaviors among participants in sponsored programs.
- Increase availability of wellness activities/services.
- Availability of walking trails and fitness courses.
- Prevalence of hypertension in employee population, community residents or specific target group.
- Increased strength of fitness class participants.
- Increased utilization of mammogram screening service.
- Prevalence of smoking and other substance use (baseline and follow-up data could be collected from HRA's).
- Appropriately used medications.

- Preventative health screenings.
- Improve HRA score for program participants.
- Employee absenteeism
- Health insurance claims.
- Staff turnover.

Note: Ensure feedback of evaluation findings into team planning process.

Reporting

Blank Planning Calendar

Blank Action Plan Form

Blank Meeting Minutes Form

Conducting a Meeting / Sample Agenda

Blank Wellness Team Project Report

Orange – Section 4

Wellness Team Planning Calendar

Date: _____

SUMMER	June	July	August
FALL	September	October	November
WINTER	December	January	February
SPRING	March	April	May

- See the Team Leader Notebook for more details on the Wellness Wheel Dimensions and Components of Wellness.
- Refer to the National Health Observances Calendar for great event ideas.

Resources:

- **Wellness Wheel Dimensions:** Environmental, Emotional, Intellectual, Physical, Occupational, Spiritual, and Social
- **Components of Wellness:** Education/Information, Assessment, Activities, and Referral

Wellness Team Action Plan for Year 200__

Date:.....

Team Name:

Number of Years Team Has Been Active

Organization:

Contact phone #:.....

Team Leader:

Contact email:.....

List Current Team Members:

Our team currently has . . . Check all that apply.

A diverse team membership

Recruited for new members

Assigned team-member roles

Regular team meetings

Team budget

Support from management

Fundraisers

Collaborated with other teams/groups

Team Mission and Goals What is the overall purpose of your team? Write here or attach separate document.

Our Team's Focus for the Year (This could also include items not checked off from the above section)

CURRENT ACTION PLAN

**(Use this section for filing a copy of
your team's Current Action Plan)**

Conducting A Meeting

1. Meetings must have a purpose and a goal; make sure you know why you are holding the meeting.
2. Outline an agenda for people involved in the meeting. Give a time framework for each discussion. Involve other people as resources to support agenda items as needed.
3. Contact team members at least 1 to 2 weeks in advance with the next meeting's agenda. This allows team members to prepare for their part in the meeting.
4. Designate the chair (doesn't always have to be the team leader) to run the meeting and keep discussions to the allotted time.
5. When conducting a meeting:
 - a. Begin on time!
 - b. Review the minutes from the previous meeting.
 - c. Follow the agenda you have on hand.
 - d. Get a playback - to check understanding of each presentation.
 - e. Try to arrive at a unanimous decision when group support is necessary.
 - f. End on time! Know when a meeting is finished - don't "visit". Conclude the meeting when the business in order is covered. Time can be allotted for socializing afterwards.
6. Keep a copy of the meeting minutes after it has been reviewed by both secretary and team leader or chair of the meeting for your records.

MEMORANDUM

SAMPLE

TO: ABC Team Members

FROM: Team Leader or Chairperson

PURPOSE: To Discuss Walk-A-Thon Fund Raising Activities

DATE: January 24, 2006

PLACE: Concord Public Library, Shakespeare Room

TIME: 9:00 AM – 10:00 AM

AGENDA *Refreshments will be provided after the meeting*

OLD BUSINESS:

Review of Minutes -Secretary	(5 minutes)
Arrangements for date, time, place for Walk-A-Thon -Jane Doe	(10 minutes)
Contacting sponsors, costs, resources -Bee Jones	(15 minutes)
Public relations Activities -Dee Smith	(15 minutes)

NEW BUSINESS:

Registration for participants -Scott Thomas	(10 minutes)
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OTHER: (5 minutes)

Date: _____
Time: _____
Adjourned: _____

MEETING MINUTES

Meeting of _____
(Team Name)

Place: _____
Name of Recorder: _____
Next Meeting Date: _____

Members Present:

<i>Topics</i>	<i>Discussion</i>	<i>Action</i>	<i>Key Person</i>

<i>Topics</i>	<i>Discussion</i>	<i>Action</i>	<i>Key Person</i>

<i>Topics</i>	<i>Discussion</i>	<i>Action</i>	<i>Key Person</i>

TEAM MEETING MINUTES

(Use this section for filing your team's meeting minutes)

Wellness Team Project Report

Team Name
Community/Business/Organization Served
Project Date/s
Project Name
Registration or other fee charged
Estimate total number of people reached

Males	Females	Youth (under 20)	Adults (20-59)	Older Adults (60+)
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Topics Covered - Circle/check all that apply.

Aging	Arthritis	Cancer	Diabetes
Family/Parenting	Mental Health	Nutrition	Physical Activity
Self Care	Spirituality	Tobacco Intervention	Stress
Other (Please specify)			

Wellness Wheel Dimensions Covered - Circle/check all that apply.

Social	Physical	Emotional	Occupational
Environmental	Intellectual	Spiritual	

Components of Wellness Covered - Circle/check all that apply.

Assessment	Education/Information	Activities	Referral
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<p>Brief comments on the goals and outcomes of the project. What difference did this project make?</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

COMPLETED TEAM PROJECT REPORTS

**(Use this section for filing a copy of your completed
team project reports)**

Resources

County Resource Person Listing

Press Release Resource

Guidelines for Fund Raising

Directory of Health and Wellness Organizations

**State of NH, Health Promotion Library
Topic Listing**

Pink – Section 5

County Resource Person Listing
UNH Cooperative Extension
County Offices

Belknap County
36 County Drive
Laconia, NH 03246-2900
(603) 527-5475

Carroll County
75 Main Street
PO Box 860
Center Ossipee, NH 03814-0860
(603) 539-3331
Ann Hamilton
Family and Consumer Resources
ann.hamilton@unh.edu

Cheshire County
800 Park Avenue
Keene, NH 03431-1513
(603) 352-4550
Nancy Bradford-Sisson
Family and Consumer Resources
nancy.bradford-sisson@unh.edu

Coos County
629A Main Street
Lancaster, NH 03584-9612
(603) 788-4961
Sue Buteau
Family and Consumer Resources
sue.buteau@unh.edu

Grafton County
3855 DCH, Box 5
North Haverhill, NH 03774-4909
(603) 787-6944
Deborah Maes
Family and Consumer Resources
deborah.maes@unh.edu

Hillsborough County
329 Mast Road Rm 101
Goffstown, NH 03045-4518
(603) 641-6060
Alice Mullen
Family and Consumer Resources
alice.mullen@unh.edu

Merrimack County
315 Daniel Webster Highway
Boscawen, NH 03303
(603) 225-5505 (from Concord area)
(603) 796-2151

Marilyn Sullivan
Family and Consumer Resources
marilyn.sullivan@unh.edu

Rockingham County
113 North Road
Brentwood, NH 03833
(603) 679-5616
Claudia Boozer-Blasco
Family and Consumer Resources
claudia.boozer-blasco@unh.edu

Strafford County
259 County Farm Road, Unit 5
Dover, NH 03820-6015
(603) 749-4445

Sullivan County
24 Main Street
Newport, NH 03773
(603) 863-9200
Gail Kennedy
Family and Consumer Resources
gail.kennedy@unh.edu

Resources

To obtain a copy of the

National Health Observances Calendar

(updated each year)

Contact:

National Wellness Institute, Inc.

PO Box 827

Stevens Point, WI 54481-0827

Phone: (715) 342-2969

Email: nwi@nationalwellness.org

Website: www.nationalwellness.org

News Release Resource

There are many websites that have helpful information; here is an example of a site that offers free help, press release ideas, sample templates and essential tips.

<http://www.massmediadistribution.com/pressreleaseideas.htm>

Fund Raising Ideas

Be Creative – Everyone is looking for money to support their good cause. The more unique your fund raiser is, the more attention and interest you will draw, and hopefully more money too! Make it fun! Think about the interests of your target audience.

Make it Personal – People are more apt to invest money in a project if they feel it will benefit them or someone close to them. Companies are more likely to give money to projects which their employees volunteer or that will benefit the community where their employees live and work.

Selecting organizations and business to approach for sponsorship

- Does the business provide services for your target audience?
- Does the business or organization provide wellness related services?
- Is the target audience a good market for the business products?
- Do any team members have a personal relationship with a particular business?

Approaching potential sponsors – Remember that although the recession has made money tighter, businesses continue to contribute money to better their community. This is commonly part of their marketing budget. Most companies have a marketing budget even in tough times.

Selling your idea

- Have specific project ideas ready to present.
- Identify specific budget items and their costs at a variety of funding levels.
- Projects need to relate to the mission of the potential sponsoring organization.
- Think about what the business will get in return for its donation. Be prepared to show how a donation to your team will be a marketing tool for them.
 - Let them know how many people you plan to reach with your project. How many are potential consumers for the business?
 - Develop ways to publicize the names of contributors to the entire community. Always thank your sponsors publicly unless they have requested anonymity. This is free advertising for them. For example, include the sponsor's name in:
 - News articles in the local paper.
 - Letters of appreciation to the editor.
 - Any project materials you print.
 - Radio and television interviews.

How much to request

Size and profitability effect how much a business can afford to give. For example:

- Ask a business to donate \$1.00 for each employee.
- Develop a range of requested donations, such as \$25, \$50 or \$100. Then ask businesses to contribute what they can.