**Oregon Public Health Division**

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**Developing and Implementing Healthy Meetings Policies in Oregon’s Public Agencies**

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A Qualitative Process and Impact Evaluation

Contact:

Kim La Croix, Policy Specialist

971-673-0606

kimberly.w.lacroix@state.or.us

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**Authors and acknowledgements**

This project was conducted and the report written on behalf of the Oregon Health Authority’s Health Promotion and Chronic Disease Prevention Section (HPCDP) by Elizabeth Stuart, a Master of Public Health candidate at Portland State University, in fulfillment of her graduate field experience requirements. Supervision was provided by Kimberly La Croix, Policy Specialist at HPCDP, with technical assistance from Shaun Parkman, HPCDP Evaluation Lead. The project activities took place January through May, 2013.

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Executive summary

**Background**

The goal of this project is to enhance understanding of the environment for implementing healthy meetings policies in public agencies across Oregon and to inform the establishment of nutrition and physical activity standards for meetings, events and conferences in state agencies.

 *“In the workplace, food is often easily available or used as a motivational tool, making it challenging for staff to adopt or maintain healthy eating habits and manage weight. Supportive workplace environments can create a workplace that positively influences social norms, promotes healthful eating and prevents the development of serious chronic diseases caused by obesity.” -*OHA Health Promotion & Chronic Disease Prevention Section Nutrition Guidelines

**Methods**

Qualitative data were collected via nine (9) semi-structured informant interviews with representatives from two state public health agencies/departments, four county public health departments, one tribal community health center, and from Beatty Group International, an event planning company. All public agencies and the tribe included in this analysis have adopted or are in the process of adopting healthy meetings policies in their workplaces. Beatty Group has experience accommodating healthy meetings policies from the perspective of a contractor/vendor. The informant agencies represent a geographically diverse cross-section of Oregon, including both rural and urban settings. The interviews were transcribed in summary form and coded and analyzed by themes. In addition, lists were created documenting challenges and barriers encountered in the policy process and lessons learned.

**Results**

**Process evaluation**

Lessons learned in the healthy meetings policy development and implementation process include the following, listed with some of the most relevant themes elicited in the interviews.

* Frame policies within the idea that health departments should role model the activities they promote to the community. (Recurring theme: Walking the talk).
* A healthy meetings policy is often the most feasible first step towards worksite wellness. (Recurring theme: Healthy meetings are the low-hanging fruit).
* Try to dedicate some staff hours to support the policy development process. (Recurring theme: Adequate workforce capacity).
* Be realistic about what your worksite is ready for, and don’t feel pressured to emulate another site’s policy. (Recurring theme: Importance of gauging employee readiness).
* Provide training (re: adhering to the policy) to staff as soon as the policy is in place and prior to implementation.
* Let non-employee stakeholders (who participate in events & meetings) know about the policy from the beginning of the process. At meetings where they are participating, make sure to communicate not only that the policy is in place, but also *why* the policy exists.
* If your agency uses particular vendors or contractors, have conversations with them early in the policy development process.
* Depending on the structure and political climate of the agency, having a director communicate the policy to everyone can be extremely helpful and help it carry more weight. (Recurring theme: Importance of leadership buy-in).
* Engage Human Resources professionals in the policy conversation and try to bring them on board.
* Frame the policy as good stewardship of public funds. (Recurring theme: We’re not the food police).
* Including a requirement for physical activity in a healthy meetings policy comes with its own set of challenges; best practices for implementing the physical activity component is an area requiring further research (see page 25 for more information).
* Anticipate additional challenges such as:
	+ Increased expense (Recurring theme: Healthy food costs more);
	+ Lack of knowledge around what healthy food entails (Recurring theme: Misperceptions about healthy food);
	+ Duration of the policy process (Recurring theme: Policy takes time).

**Impact Evaluation**

An evaluation of the impact of the policy development process and policy implementation on the worksites in the sample found the following:

* Developing and implementing a healthy meetings policy can increase awareness of employee health and change attitudes towards worksite wellness policies. (Recurring theme: Building a culture of health).
* Healthy meetings policies can change perceptions around what constitutes healthy food.
* Recent changes (in Oregon) in the availability and accessibility of healthy foods have made implementation of healthy meetings policies easier. (Recurring theme: Changes in healthy food availability).
* Development of a healthy meetings policy at one agency can inspire other worksites to develop their own policy. (Recurring theme: Domino effect).

Note: Interviews from tribal and contractor staff were analyzed separately but reflect many of the same themes found in the interviews with public agency staff; the most common themes from these interviews are integrated into the summary above.

*“I think [our healthy meetings policy] is changing social norms…it shows people this is doable, it’s not rocket science, that we definitely can serve healthy food to our friends and partners with government dollars. It also shows that you don’t always have to serve food, and people will still come.” –*Respondent #3

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Evaluation Report

**Project background**

The goal of this project is to enhance understanding of the environment for implementing healthy meetings policies in public agencies across Oregon and to inform the establishment of nutrition and physical activity standards for meetings, events and conferences in state agencies.

 *“In the workplace, food is often easily available or used as a motivational tool, making it challenging for staff to adopt or maintain healthy eating habits and manage weight. Supportive workplace environments can create a workplace that positively influences social norms, promotes healthful eating and prevents the development of serious chronic diseases caused by obesity.”* -OHA Health Promotion & Chronic Disease Prevention Section Nutrition Guidelines

**Evaluation framework**

This evaluation is based in the PRECEDE-PROCEED model for program planning and evaluation (see Appendix E). The current project focuses specifically on Process Evaluation (Step 7 of PRECEDE-PROCEED) andImpact Evaluation (Step 8 of PRECEDE-PROCEED). Based in this framework, process evaluation focuses on what degree of policy implementation is being carried out according to plan, and primarily what factors are involved in policy development. Impact evaluation focuses on changes in influencing factors which impact the likelihood of behavioral and environmental change. According to the National Cancer Institute’s monograph entitled *Theory at a Glance: A Guide for Health Promotion Practice* (2005),

 The three types of influencing factors include:

* *Predisposing factors*, which motivate or provide a reason for behavior; they include knowledge, attitudes, cultural beliefs, and readiness to change.
* *Enabling factors*, which enable persons to act on their predispositions; these factors include available resources, supportive policies, assistance and services.
* *Reinforcing factors*, which come into play after a behavior has been initiated; they encourage repetition or persistence of behaviors by providing continuing rewards or incentives. Social support, praise, reassurance and symptom relief might all be considered reinforcing factors.

(Monograph available at <http://www.cancer.gov/cancertopics/cancerlibrary/theory.pdf>)

**Methods**

Qualitative data were collected via nine (9) semi-structured informant interviews with representatives from two state public health departments/agencies, four county public health departments, one tribal community health center, and Beatty Group International, an event planning contractor. All public agencies (state and county) and the tribe included in this analysis have adopted or are in the process of adopting healthy meetings policies in their workplaces. Beatty Group has experience accommodating healthy meetings policies from the perspective of a contractor/vendor. The respondent agencies represent a geographically diverse cross-section of Oregon, including both rural and urban settings.

All respondents were provided with and signed an informed consent form (see Appendix A) prior to being interviewed. All interviews were recorded and transcribed in summary form. All respondents were provided with the opportunity to review the transcript of their interview and approve any direct quotations used in this report. Interview protocols (see Appendices B-D) differed for public agency interviews, the tribal interview, and contractor interviews. One public agency interview included two informants in a shared interview; they are cited as a single respondent. The two contractor personnel were interviewed separately.

The interview summaries were analyzed and coded by themes and frequencies of themes were calculated. Additionally, lists of challenges and lessons learned were determined from the summaries. The results of the Beatty Group and tribal interviews were analyzed separately from the public agency interviews.

Note: While the term “policy” is used in this report, it is important to recognize that some of the respondent agencies chose to frame their healthy meetings policies as guidelines, feeling that guidelines imply less restriction and are therefore more acceptable to staff. **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Results**

*“I think [our healthy meetings policy] is changing social norms…it shows people this is doable, it’s not rocket science, that we definitely can serve healthy food to our friends and partners with government dollars. It also shows that you don’t always have to serve food, and people will still come.” –* Respondent #3

**Policy content**

Types of policies

The six (6) public agencies had all successfully negotiated healthy meetings policies or guidelines at the time of the interviews. The size of the agency staff in the sample (those to whom the policy applies) varied from a staff of 30 to a staff of 5,000. The most common staff size in the sample ranged from 200-800.

It is important to note that the impact of healthy meetings policies often stretches far beyond the staff at the worksite. The nature of the work of public health departments means that numerous stakeholders and community members attend department-sponsored meetings and events, meaning that those beyond the scope of the worksite are exposed to the healthy meetings policies as well.

The types of policies revealed in the sample range from general guidelines about what kind of food to serve at meetings to specific procurement policies limiting the purchase of unhealthy foods, such as sugar-sweetened beverages, with public funds. In general, the policies tended to fall into two categories: 1) The policy does not limit unhealthy foods, but requires that healthy options must also be served, or 2) The policy provides nutrition standards with which all foods must comply. All of the policies encourage the serving of fresh fruits and vegetables, whole grains, and foods low in fat and added sugar. Five of the policies apply to any meetings, events or conferences sponsored by the health department in question. One policy applies to all meetings, events or conferences sponsored by any department in that county.

Of the six policies:

* 3 contain a requirement for physical activity during meetings (see section on page 25 for more information).
* 2 restrict the serving of food at meetings of short duration or not falling over a mealtime.
* 3 do not restrict unhealthy foods except for sugar-sweetened beverages (but encourage that healthy foods be served alongside unhealthy ones).
* 6 prohibit the serving of sugar-sweetened beverages (the serving of 100% juice appeared as a point of debate in 3 of the policies).
* 2 include a stipulation that when food is brought to the workplace to share (for potlucks or in the break room, for example), healthy options be provided.
* 2 require nutritional content (calorie) labeling.
* 3 recommend purchasing locally when possible.

Policy timelines

The majority of the policies in the sample (5) were adopted in the last three years (2010-2013). One was adopted in 2005. The duration of the policy development process differed from agency to agency. A respondent from a small public health department reported a very short process of a few months; another reported that the policy process lasted six years. Four respondents reported a process lasting one to two years.

At the time the interviews were conducted, four of the policies had been in place for at least one year. One had been fully developed but not implemented yet because it was in union review at the time of the interview. One policy had been implemented a month prior to the interview.

Differences in meeting planning practices

All of the respondents reported that agency staff plans their meetings and events. Two respondents reported also using an outside contractor (Beatty Group) to organize some larger events and conferences, and one respondent reported using an on-site food vendor to provide food for some events.

Note: While healthy meetings policies often contain requirements both around nutritional standards and physical activity, for the purposes of this report, the process and impact evaluation sections will focus solely on the nutritional component of the policies. See page 25 for further information.

**Process evaluation**

This section evaluates the process of developing and implementing healthy meetings policies in Oregon’s public agencies. Process evaluation gauges the degree to which the policies have been implemented according to plan, and what factors were involved in the policy development process.

Most public agency respondents noted that the final form of the policy did not match the original idea for the policy. This was not generally considered to be a bad thing, just something to take into consideration. Half of the agencies mentioned debates around whether certain types of food products could or could not be served (100% juice being the most controversial).

One agency’s policy was written to correspond with the Dietary Guidelines for Americans. This agency’s respondent noted that its policy has changed over time due to changes in the Dietary Guidelines; for example, attention to sodium content is now much more at the forefront of this policy.

Information elicited in the policy process section of the interviews fell into two main categories: *policy development steps* and *policy development themes*. *Policy development steps* comprises the concrete activities undertaken by agencies in developing their healthy meetings policies. *Policy development themes* comprises the various themes that came up in the interviews and provide critical insights into important factors to take into consideration.

**Policy development steps**

The majority of respondents reported referring to existing healthy meetings policies as a model for their own policies (resources and examples of existing policies are available on page 32). Stakeholders involved in the policy development process varied from agency to agency. One large agency formed a workgroup with other agencies and companies in the community in order to develop common messaging and framing of the policy that could be used by all workgroup members. In one small agency, the policy was written mainly by one department leader with some input from other managers. Most mid-sized departments reported using a committee-led development format, where a team of staff members worked directly on writing the policy, but all other staff affected by the policy had the chance to give input.

As discussed in the *policy development themes* section, whether the policy development process is top-down (the policy is imposed by the leadership) or iterative (the policy is created with staff feedback) depends greatly on staff attitudes and the political climate of the agency in question. In general, smaller agencies seemed more capable of passing a policy with less staff input, for a variety of reasons.

Methods for assessing employee readiness

All respondents were asked what kind of assessments they performed in order to determine employee readiness for healthy meetings policies and solicit feedback from staff. The answers included the following scenarios:

* No formal assessments were done, but conversations were already happening among staff about the types of foods being served or brought to the worksite to share.
* No formal assessments were done, but healthy foods were already being served (i.e., healthy meetings were happening in practice but not in policy).
* A series of information sessions were held regarding a potential healthy meetings policy and all employees were invited to participate and share their thoughts.
* An advisory group was developed to guide the policy development process; all employees had the opportunity to be members of this group.
* All-staff surveys were conducted regarding attitudes towards healthy food and ideas for policies and health promoting actions by employers.
* Interviews were conducted with key staff, employees in charge of purchasing and in the case of one county, with county commissioners.
* An anonymous drop box was provided where employees could leave their comments and input regarding the potential healthy meetings policy.

One respondent also mentioned that while outside (non-employee) stakeholders who would be affected by the policy were not included in the policy development process, their feedback was solicited via evaluation forms at meetings and events once the policy was in place. This feedback was used to determine how best to inform meeting attendees about the policy and explain why certain foods were not being served.

Grant funding as motivation for healthy meetings

All respondents were asked whether their healthy meetings policy was the result of grant requirements, and all of them reported that this was not the case. However, respondents from three county agencies reported that while the policy was not explicitly required through their Communities Putting Prevention to Work (CPPW) or Healthy Communities grants, they wrote the policy development into their grant work plans and used staff time provided under the grant to do this work. One agency developed its healthy meetings policy on a completely voluntary basis.

Methods for notifying and training staff

At the point of policy implementation, notification and training of staff at the various agencies took multiple forms, including:

* Announcements at all-staff meetings;
* Emails/listservs/all-staff newsletters;
* Posters in hallways/break rooms.
* Managers were informed and asked to notify their staff about the policy.
* In some agencies, where staff members were involved in the policy development process, no formal notification was deemed necessary.
* One respondent reported that the agency periodically re-circulates the policy via email or finds a way to work it into a newsletter article or presentation in order to keep it on the staff’s radar.

In the case of the agency that developed their policy as a procurement policy, only the staff who do purchasing of food were notified of the new policy (via their managers) and were provided with a self-guided training on the policy. Two respondents reported not providing any specific training around adhering to the policy. One respondent was not certain that the policy had been circulated to all affected staff. Additionally, one respondent reported not providing training when the policy was first implemented, but offered training a couple years later, after the agency had some experience putting the policy into practice.

**Policy development themes**

The themes presented in this section help inform many of the policy development steps presented above. Themes elicited in the interviews are underlined. Frequencies of themes are presented in parentheses after the name of the theme. Direct quotations illustrating each theme are presented in italics.

**Policy origins**

The following themes relate to the origins and motivations behind the six public agencies’ healthy meetings policies.

Walking the talk (5 of 6)

This theme denotes that role modeling for the community is regarded as an important reason for implementing healthy meetings policies. As taxpayer-funded agencies, “practicing what you preach” was referenced repeatedly as a duty to the public to spend tax dollars responsibly. Additionally, respondents referred to the fact that the impact of healthy meetings policies often extends beyond health department staff (with community members attending department-sponsored meetings and events) so chances for observational learning extended beyond the workplace and had the potential to impact vendors and the food system as a whole.

*“For a health department, it’s all about modeling what you’re trying to tell these other organizations about worksite wellness…we really felt like it was important for ourselves to be implementing the policies we were advocating for. So I think that was the number one motivator to pilot these policies - to be able to show that we’re not just telling other people what to do, but that we’re trying to implement them ourselves.” –* Respondent #4

Two respondents referred specifically to the idea that in addition to role modeling, health departments can be the most appropriate place for trying out worksite wellness policies like healthy meetings before expanding them to other departments.

*“Well, it’s a thousand times easier [to do this, being a health department]. I mean, come on - the word ‘health’ is in our name…That gives us a real leg up.” –* Respondent #5

*“Our environment here just naturally supports doing things like this. So honestly the health department is often the pilot location - we’re the guinea pigs for a lot of these kinds of things, and then roll it out to everybody else [in the county or building].” –* Respondent #6

Importance of gauging employee readiness[[1]](#footnote-1) (6 of 6)

All six respondents repeatedly emphasized the importance of making sure that their agencies’ staff was receptive of the policy prior to implementation. The emphasis on this theme makes it clear that the content of a healthy meetings policy must correspond to the attitudes of the affected employees in order to motivate adherence to the policy. Two respondents talked specifically about how their original policy intentions changed throughout the course of the development process, sometimes “letting the hard stuff go” in order to implement a policy that would not alienate the employees. The need for a policy that was “supportive and not punitive” is reflected by this theme as well.

*“I would say definitely engage staff in moving forward with anything like this. I mean, you can’t really do this in a silo…Certainly assess people’s readiness for things like this.” –* Respondent #6

*“I think having the read on organizational readiness was really really important. If we had gone forward with what our original idea was, it would have just completely backfired, and completely set us back from our health goals and moving our organization forward in other ways.” –* Respondent #1

Healthy meetings are the low-hanging fruit(3 of 6)

This theme is a reflection of the fact that in terms of developing worksite wellness policies, healthy meetings is often the most feasible first step. Three respondents specifically cited the fact that healthy meetings standards are the most acceptable place to begin to build policies, because this arena does not have to interfere with employees’ personal food purchases. None of the policies prohibit anyone from bringing their own food or beverage to a meeting, but only focus on what can be purchased with agency moneys. This makes meetings an easy venue to begin to change norms around food in the workplace.

*“We did feel that tackling other types of food issues at that time would just be more than we could probably handle. So a lot of our reasoning was really based on what did we think would be accepted and fairly easily implemented given the state of our [agency’s] culture?” –* Respondent #5

Importance of leadership buy-in\*(6 of 6)

When asked about the role of agency leadership in developing healthy meetings policies, all the respondents immediately emphasized the importance of leadership buy-in in successfully developing and implementing these types of policies. In three cases, agency leaders were cited as a driving force behind developing the policies. In one case, non-supportive leaders were noted as being an obstacle to passing the policy, but perseverance and diplomatic conversations helped change these individual’s attitude toward the policy. In the remaining agencies, leaders were supportive and kept in the loop about the policy development process, while not directly engaged in it. In all cases, the policy had to be approved by the agency leadership and so their support of the policies was critical to successful implementation.

*“[The director] has always been very firmly behind this. Honestly, without that kind of leadership support, it’s just almost dead in the water. You can hardly do this kind of thing if your bosses aren’t for it.” –* Respondent #5

**Challenges/barriers**

The following themes all relate to issues that came up as obstacles to developing and implementing healthy meetings policies.

Healthy food costs more[[2]](#footnote-2) (2 of 6)

Notably, the two respondents that brought up this challenge are the ones whose agencies’ policies place tighter standards on the kinds of food that can be served at meetings (as opposed to simply providing healthy options alongside unhealthy ones). This correlation suggests that when trying to abide by stricter nutritional standards, budgetary constraints need to be taken into account.

We’re not the food police*\**† (5 of 6)

A challenge cited in the majority of the interviews was the issue of personal choice and how this played into employees’ attitudes towards a policy that changes what types of foods are made available to them. Public perceptions of “nanny state” policies were mentioned as a factor behind these attitudes and agencies spoke about the importance of anticipating pushback based on these perceptions. Overall, respondents reported that the best ways to address these concerns were to 1) provide more food options rather than less, 2) emphasize health promotion and the employer’s desire to support its staff by providing healthful options (making the healthy choice the easy choice), and 3) frame promotion of the policy in the best use of taxpayer dollars and remind employees that they are not restricted in their own purchases or what kind of food they choose to bring for themselves.

*“We don’t want to reinforce that there’s any kind of negative impact, all we’re trying to do is provide healthier options for people and make it a positive and friendly environment for people who are trying to do the best thing for themselves and their own wellness. We’re trying to make that easier for people and not trying to take anything away from them.” –* Respondent #1

*“[Healthy meetings] was kind of our first go at how to use public dollars in a way that would really model what we’re trying to do…The leverage point was that we’re not asking for people to do this with their personal money, on their own personal meals and lunches. What we’re saying is that with government money, we’re going to start to shift the social norm in the ways in which we spend it.” –* Respondent #3

(Debunking) food as an incentive (2 of 6)

Two respondents whose policies prevent food from being served at short meetings or those occurring between mealtimes noted that during the policy development process one of the concerns that came up was that food is often used as an incentive for meeting attendance. The respondents noted that when foods were removed from certain meetings, participation did not change, and suggested that there should be more focus on the importance of the meeting content than on whether or not food is served.

 *“Some people who are cultivating community partnerships feel that if they don’t provide food, nobody will come…I was trying to suggest that we need to hold firm… if you think the only way you’re going to get people there is with food, then maybe there’s a bigger problem. Although I do understand that it is a cultural thing in some cases.” –* Respondent #5

Misperceptions about what constitutes healthy food†(3 of 6)

This theme reflects the fact that the term “healthy food” can mean different things to different people. Without adequate education and definition of this term, implementation of healthy meetings policies can be hampered. Respondents mentioned that they encountered employees who were under the impression that they were providing healthy food and promoting health, when in fact the foods they were serving were still high in fat, sugar or sodium.

Agency political climate(3 of 6)

Half of the respondents reported that the timing and smoothness of their policy development process depended a lot on the political climate within the workplace. One respondent cited this as the agency’s biggest challenge, noting that if something controversial about food environments is happening at the state or national level, it can impede forward movement on a worksite food policy.

Adequate workforce capacity\*(4 of 6)

This theme relates to the need for adequate funding, staff training/skills, and technical assistance in order to develop and implement healthy meetings policies. The majority of respondents noted that without the staff FTE written into their grant work plans, they would have been unable to carry out this work to the same degree or in a timely manner. Changes in staffing and funding were mentioned as barriers to consistent implementation. One respondent noted that having a position with some hours dedicated specifically to coordinating and providing administrative support to healthy meetings policy development was extremely helpful in getting the policy off the ground.

*“One of the pieces of…[our] work was to try and get a group at [our agency] established in policy so that it would be sustained through these vagaries of funding. Over time there had been various groups working on…[worksite wellness]…but they were always dependent on somebody who was dependent on some grant…and they would then would go away when that grant went away.” –* Respondent #5

Policy takes time(5 of 6)

It is important to note that most of the agencies framed this theme not as a challenge so much as something to take into consideration when developing a worksite wellness policy. All of the agencies were successful in passing their policies, but most noted that there are many steps to negotiating a policy and this should be anticipated when planning for the policy process.

*“Everything takes a long time, it takes a long time to get people’s feedback, it takes a long time to get leadership to pay any attention…but that’s just about patience.” –* Respondent #5

**Success stories**

All respondents were asked if they had stories or anecdotes to share that demonstrated the success of their healthy meetings policies. Many respondents told stories about employees who were “ahead of the game” and were already implementing healthy meetings practices, such as an employee who works with youth in the community and has begun providing salad and fruit alongside the pizza he brings to events, and serving water instead of soft drinks.

One respondent noticed that staff are bringing healthier foods to potlucks at work, specifically citing that a lot of kale shows up at these events.

Another respondent told how a staff member from an outside agency tried to give a pizza to the county WIC staff as a thank you for something. The response from the WIC office was to apologize and explain that they could not accept the pizza, citing the nutritional standards in the department’s healthy meetings policy. The person giving the pizza was impressed and appreciated the reasons for refusing it; this story demonstrates how a healthy meetings policy can educate those beyond the worksite.

One respondent noted that the success of the policy was in how long it had been in place and that the agency had “stayed the course.” This respondent mentioned a change in the agency’s stakeholders and their expectations of what kinds of food they would get at agency-sponsored meetings. It was also noted by this respondent that a shift is occurring statewide in this regard, and that there are other factors beyond healthy meetings policies that are responsible for this shift.

*“We did a chili cook-off not too far beyond when we had implemented these guidelines. We asked all the people who brought their chili to bring the recipe with nutritional guidelines as part of it too. One of the criteria for judging was how healthy a particular chili was, so it was a good way for us to kind of call out these healthy meeting guidelines and have fun doing it…It was a nice way to show the guidelines in action and that it was cool…We hold healthy potlucks too.” –* Respondent #6

**Lessons learned**

All respondents were asked about what lessons they learned during the policy process, what they might do differently, and/or what their recommendations were for making the process smoother. Many of the important factors to consider are reflected in the themes listed above, but additional lessons mentioned include:

* Try to dedicate some staff hours to supporting the policy development process
* Be realistic about what your worksite is ready for, and don’t feel pressured to emulate another site’s policy.
* Provide training (re: adhering to the policy) to staff as soon as the policy is in place and prior to implementation.
* Inform non-employee stakeholders (who participate in events & meetings) about the policy from the beginning. At meetings where they are participating, make sure to communicate *why* the policy exists.
* If your agency uses particular vendors or contractors, have conversations with them early in the policy development process.
* Depending on the structure and political climate of the agency, having a director communicate the policy to everyone can be extremely helpful and help it carry more weight.
* Engage Human Resources professionals in the policy conversation and try to bring them on board.

*“Part of the framing is just to say how easy it actually is.” –* Respondent #1

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**Impact evaluation**

*“The purchasing policy impacts more than just employees, and that’s another piece of it. So many of our events and the reasons why we purchase food are for community gatherings, community events to bring people to the table, and so providing healthful options [to community members and people from vulnerable populations]…there are a lot of different good reasons to hit it at the purchasing level.” –* Respondent #1

Within the PRECEDE-PROCEED framework, impact evaluation investigates changes in influencing factors which impact the likelihood of behavioral and environmental change. To investigate the impact of their healthy meetings policies on the culture of health at their worksites, agencies were asked about how the policy was received by employees and other meeting participants, by vendors/contractors who would have to accommodate the guidelines, and how they thought the policy had changed their worksite. The themes elicited by these interview questions (and others, due to the semi-structured nature of the interviews) were categorized based on the three types of influencing factors: Predisposing, enabling, and reinforcing. Please note that the respondent from the agency whose policy was not yet implemented, and the one whose policy had only been implemented for a month, answered these questions in relation to the impact of the entire policy process rather than the impact of the policy itself.

**Changes in predisposing factors**

The themes in this section reflect changes in individuals’ or populations’ knowledge, values, and beliefs. Notably, none of the respondents specifically reported changes in individuals’ thinking around personal choice and responsibility around food (in relation to “nanny state” policies), but noted changes in the employee population as a whole.

Building a culture of health\* (4 of 6)

Four respondents spoke specifically about increased awareness around employee health, changes in attitudes towards the healthy meetings policies, and increased morale at the worksite. One respondent did note that while the conversation about health is changing, the culture at the agency has not yet caught up to the policy.

 *“We’ve really shifted and moved our audience, the only bad comments we tend to get now are just ‘I didn’t like that dish.’” –* Respondent #3

Changes in perceptions of what constitutes healthy food† (2 of 6)

One respondent noted changes in awareness among staff of what defines truly healthy food. Another noted the opposite – that no such changes had been noticeable among employees.

**Changes in enabling factors**

The themes listed here relate to factors that enable people to act on their predispositions; these factors include available resources and supportive policies.

Creation of user-friendly policies (4 of 6)

Four respondents specifically noted that they intentionally wrote their policies to be user-friendly for employees so as not to create a barrier to accommodating the policies. One respondent also mentioned intentionally planning for the technical assistance required by employees in abiding by the policies (such as providing assistance with calorie analysis to accommodate the nutrition labeling requirement).

*“We left the nutrition standards kind of loose, we developed guidelines that people can use, that can be updated as information is updated in the field and evidence increases. We also wanted the nutrition guidelines to be easy enough to follow that it didn’t intimidate anybody.” –* Respondent #3

Changes in healthy food availability*\**† (5 of 6)

Most of the respondents noted changes over time in the availability of venues for purchasing healthy food, and in vendors’ abilities to provide healthful options at meetings and events. Most of the respondents noted that some education of vendors was necessary, and also that the healthy meetings policies were not solely responsible for this shift in the market, but were possibly contributing to it.

*“[We were] trying to figure out caterers who could meet these guidelines, we were having to challenge the caterers because they were just so used to ‘here’s your boxed lunch with a cookie in it’…so we had to try to figure some of those things out.” –* Respondent #3

*“[Finding vendors that could comply with the guidelines] wasn’t nearly as hard as what we first thought…What I did have to spend time with our contractor on was just getting comfortable saying, ‘We have to provide them with nutritious food…make sure what we’re doing is healthful…it doesn’t need to be perfect or great or five star.’ So you just really kind of reframe what your expectations are.” –* Respondent # 3

Domino effect (3 of 6)

Three respondents spoke about how their policy was now being used as a model policy by other agencies. One noted specifically that the policy process developed at the agency was now a “model process” that could be used in developing future worksite wellness policies.

**Changes in reinforcing factors**

The themes in this section reflect changes in factors that encourage repetition or persistence in abiding by healthy meetings policies by providing continuing rewards or incentives.

Staff reactions/social pressure to abide by the policies† (4 of 6)

The majority of respondents reported positive reactions to the policies and changes in these reactions over time, which encourage continued adherence to the policies. Two respondents specifically mentioned increased social pressure to provide healthy foods at meetings.

*“[There wasn’t] nearly as much [negative reaction] as I thought we were going to get, you know? Really it was kind of amazing, I thought. The main concerns generally were…that somebody was confused and they thought we were saying they couldn’t bring anything to work or they couldn’t provide food, so those concerns could be dealt with pretty easily.” –* Respondent #5

Lack of policy enforcement (5 of 6)

One of the main reinforcing factors with policy can be official enforcement. However, five respondents specifically noted that they do not officially enforce or intend to enforce their healthy meetings policy. In all cases, this was related to the desire to promote the policies as empowering, rather than punitive. A respondent from a smaller agency also noted that in terms of health impact, enforcing healthy meetings policies was not the best use of staff time.

*“I know I should be doing more [about enforcement], I haven’t prioritized it…but I’ve got bigger fish to fry and I’m frying them…[I’m working to] expand understanding and involvement in broad work in this county among elected officials and community leaders…and some of that work has led to the adoption of [wellness policies at much larger organizations and businesses]…it’s so much more influential…[it’s a bigger health impact than what we serve at our department meetings].” –* Respondent #2

Next steps

Respondents were asked what their longer term goals were regarding healthy meetings, and what their next steps around food environments were after successful implementation of healthy meetings policies. Responses included the following:

* Implementing healthy meetings policies in all county (or state) departments, not just public health offices;
* Addressing shared food brought to the workplace;
* Healthy vending policies;
* Tightening the nutrition standards within the policy (moving from more options to fewer);
* Strategic planning around worksite wellness in general and setting up worksite wellness teams.

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**Tribal interview results**

At the time of the interview, the tribal health services department in the sample was at the very beginning stages of developing a healthy meetings policy. For this reason, the interview protocol was modified to reflect intentions around healthy meetings and the tribe’s experience with worksite wellness programs in general, and so was analyzed separately from the public agency interviews. While the bulk of the interview content did not relate directly to healthy meetings, this was a useful exercise in understanding what the policy process looks like in a tribal setting.

Currently, the tribe’s plan is for its healthy meetings policy to apply to all tribal government-sponsored meetings and events, with a modified policy for tribal youth events. The projected timeline shows the policy being in place by the end of 2013. This interview revealed a healthy vending policy as a next step after implementing a healthy meetings policy, and cited policy enforcement as a potential barrier in implementing healthy meetings.

Despite the differences in interview structure, the interview elicited many of the same themes found in the public agency interviews.

Importance of gauging employee readiness

*“We’re really primed [for healthy meetings] – there has been a lot of discussion, a lot of informal attempts to guide food choices for meetings…but we want to develop a policy that will be broadly applicable.”*

Adequate workforce capacity

Like many of the public agencies, the respondent noted that the tribal health services agency had written a position into a grant work plan in order to provide staff capacity for development of healthy meetings policies. At the time of the interview, the new staff person had just been hired.

Importance of leadership buy-in

*“Our worksite wellness programs are in large part due to a pretty progressive board…and a governing body that was actually able to see the bigger picture and take a little bit of a risk.”*

We’re not the food police

*“I think that’s a first step that we will be promoting [to have at least 50% of the foods served be healthy choices], and then after people become exposed to that, we can move forward [to a more specific policy of what can and can’t be served] if the reception of that is okay.”*

*“The culture of wellness has become more socially acceptable and continues to improve, but [the concept of infringing on one’s personal freedom to make food choices] will continue to be a challenge.”*

Additional factors revealed in the tribal interview include the following:

Inclusion of traditional foods

The tribal healthy meetings policy is planned to require an offering of traditional foods (such as dried cranberries) at all meetings and events as an additional healthy food option. This component of the policy will also require labeling of the traditional foods, to increase education and exposure about these foods among attendees.

Health status as a motivator for the policy

*“[It was about] looking at the weaknesses that we had in our health status and then what types of programs we were offering and what employees were demanding, and tying that all together and designing a program for worksite wellness.”*

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**Physical activity in healthy meetings policies**

Three of the six healthy meetings policies at public agencies contained a component requiring that time and options for physical activity be a part of meetings of a certain duration. Because only half of the policies addressed physical activity at meetings, and because the interviews with Beatty Group staff elicited critical information about implementing the physical activity component, the information is presented here as a combination of public agency feedback and that of contractor staff.

**Policy content**

Three agencies’ policies contained a requirement for physical activity during meetings of a particular duration (usually over an hour). One respondent specified that for daylong meetings, 30 minutes of time must be set aside for physical activity. All three mentioned that part of the practice of these policies included simply getting everyone to stand up and stretch every 60 minutes, while continuing the meeting.

**Physical activity component as a barrier**

One respondent noted that the existing sample language around physical activity at meetings is not very helpful, and that better tools are needed for developing policy around physical activity at events and meetings (see *Areas for Further Research*, page 32). Another respondent cited difficulties in implementing the physical activity component of the healthy meetings policy, particularly at large events and conferences.

As one respondent noted, when it comes to food, people have to eat, but you cannot make someone be physically active if they don’t want to be (this was reiterated in the interviews with Beatty Group staff). This respondent also specified cell phone usage as a barrier to participation in the physical activity at meetings (e.g., attendees use break time to catch up on calls and texts rather than participate in the provided activity). The same respondent reported trying lots of different things to increase participation, but still having difficulty with the implementation of this piece of the policy.

**Contractor perspective on physical activity component**

Both Beatty Group staff members were asked about accommodating the physical activity requirements of a healthy meetings policy. They reported that while the actual scheduling and planning of the physical activity does not pose a barrier, getting attendees to participate is difficult.

It was also noted that more attendees participate when the activity leader is someone they already know and are comfortable with (e.g., a coworker who is also a yoga instructor).

*“What we’ve had to do is modify, it’s not full-on yoga, it’s working with the space that we have, letting the instructor know that there are tables and chairs, forming it to fit the environment that they’re in.” –* Respondent A

*“Lots of people register, and only a few show up. You hire an instructor, and no one shows up. I felt bad about that.” –* Respondent B

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**Contractor experiences with healthy meetings policies**

*“I find myself having to explain why I need these options…It makes [chefs] have to think outside the box too…they…don’t want to have to think about how to make this pasta dish vegetarian and this sauce not have cream in it. They have their set things they do...but eventually it happens. It’s just…making it happen.” –* Respondent A

Although the interview protocols were different, many of the same themes found in the public agency interviews were reflected in the interviews with Beatty Group staff.

Interestingly, some of the public agency respondents expressed the belief that sourcing healthy food that fits the requirements of the policies does not pose a barrier to contractors or vending staff. However, the information provided by contractor staff would suggest otherwise. This discrepancy indicates that increased conversations between agencies and their vendors/contractors can be useful in making sure that both parties are on the same page regarding the challenges of complying with nutrition standards during event planning.

Both Beatty Group respondents reported that they had only contracted with one government agency that used a healthy meetings policy, and that this type of policy was a very new concept in the event planning industry.

The following themes came out in the interviews with Beatty Group respondents:

Staff reactions/social pressure to abide by the policies (2 of 2)

Both respondents reported witnessing social pressure within the public agency regarding the need to comply with the healthy meetings policy. However, one respondent also reported differences between public agency staff in their adherence to the policy when in charge of planning an event/working with Beatty Group, and pointed out that when an agency staff member is not abiding by the policy, it puts the contractor in an awkward position regarding enforcement.

*“If they have picked out a menu that I don’t agree with, I feel like it’s my responsibility to at least mention it…but I’ve had some push back pretty defensively…and I felt like I needed to step back.” –* Respondent B

We’re not the food police (2 of 2)

Both respondents talked about issues of personal choice as part of the reactions of meeting attendees to the implementation of the policy. Both described receiving more positive than negative reactions about the food served at meetings, and reported addressing negative reactions by explaining that there are no limitations on what attendees purchase for themselves.

*“At what point it is it that individual’s personal responsibility and personal choice? How much can you regulate that ‘you will eat this,’ or ‘you won’t eat that’? At some point, these are all adults, and they have to make their own choices…You CAN regulate what you will, and will not, pay for though.” –* Respondent B

*“[The negative reactions tend to come from someone who] didn’t have cream for their coffee or really wanted a diet coke in the afternoon…individual cases. It’s bizarre…people have gone out and bought creamer and actually set it next to the coffee…there is resistance, but for the most part people are positive.” –* Respondent A

Healthy food costs more (1 of 2)

One respondent cited the expense of healthy food as one of the biggest challenges to accommodating the policy. In addition, the added cost of trying to purchase locally and/or sustainably grown food (as recommended by the policy) was mentioned as a challenge.

*“It’s a challenge on the budgets…healthy food costs more… Most standard catering menus start out quite a bit above per diem so when you add in the healthy food aspect, we can’t always get everything we want for the price we can spend. Most meetings are requiring a hot buffet for lunch with options for many dietary issues (vegan, vegetarian, gluten free, etc.) and that also drives the cost up.” –* Respondent B

Misperceptions regarding what constitutes healthy food (2 of 2)

Both respondents talked about misperceptions among caterers and venues regarding what constitutes healthy food, and that the job of the contractor often includes educating the caterer about what is meant by “healthy.” One particular misperception mentioned was that of equating “organic” with “healthy.”

Healthy meetings means extra work (2 of 2)

Both respondents talked about the extra work it takes to accommodate a healthy meetings policy. Both described having to deal with “a lot of back and forth” with venues and caterers to make sure the policy is understood and followed.

*“It’s not an easy thing to do, and it’s foreign in our industry, both for attendees and chefs and venues…it’s a struggle…We have to tweak everything because nothing in the regular menus will work…it’s A LOT of extra work, to be honest, but I am happy to do so because I really think it is a good thing…As the industry changes, it will get easier and easier.” –* Respondent B

*“[The constant back and forth and more opportunity for confusion on prices]…That’s my biggest struggle. You just have to go through it, but the end result still happens.” –* Respondent A

*“Right away I try to lay it out and be clear as possible with what we need. Sometimes they just get it right away and some just straight up don’t understand what you’re wanting.” –* Respondent A

Independent caterers make it easier (2 of 2)

Both respondents were asked if they experienced differences in complying with the healthy meetings policy in rural versus urban areas. Both reported that it was much easier to accommodate the policies when working with smaller businesses and/or in rural parts of the state.

It was pointed out that most large venues/vendors have standard policies and prices that preclude accommodation of healthy meetings policies (to deviate from these standard policies, vendors have to source ingredients that they do not normally purchase, and buy them in smaller quantities than usual orders, which costs them more).

*“I think with rural areas it’s more local, homegrown, more flexibility when you’re working with an independent caterer. And in the city, working with hotel catering staff, it’s more cut and dry what they can do, and less flexibility…I personally feel like it’s easier to work with an independent caterer…but it is kind of subjective.” –* Respondent A

Changes in healthy food availability (1 of 2)

One respondent spoke extensively about how the availability of healthy food has increased over the last several years, and how venues that want to get the business of large public agencies are changing their practices and per diem menus to more readily accommodate the requirements of healthy meetings policies.

*“Normally they [venues] aren’t willing to do that…but it’s in the venue’s interest to not recreate the wheel for every meeting that comes in...I thought it was a great move.” –* Respondent B

*“It’s been a growing process…when we started doing [healthy meetings], the different chefs and venues and caterers…were like, ‘you want what?’ And there were times when I just simply couldn’t get things that we needed. We couldn’t get whole wheat bagels, we couldn’t get low fat granola…Things are definitely changing…things are more readily available now. When we first started doing it they weren’t. It was very much a challenge.” –* Respondent B

Successes

*“My favorite was a meeting that we had in Roseburg…I worked with a small town caterer…she made the most awesome meal…it was amazing. People were raving about it, I didn’t hear one bad thing about it…it’s amazing to support a local woman…this is her passion, cooking…it was definitely a success in that people didn’t realize it was a healthy menu…they were like, ‘this is just good food’…They didn’t feel like they were restricted.” –* Respondent A

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Conclusions

The findings of this evaluation indicate that healthy meetings policies are often considered a feasible first step towards broader worksite nutrition policies, and can be successfully developed and implemented in public agencies of many sizes. In addition, healthy meetings policies appear to fall into two categories: those that require healthy food options to be served alongside less healthy options, and those that restrict the serving of unhealthy foods. Policies in the latter category seem to be viewed as the long-term goal by some sites; those in the first category are viewed as a first step that does not inhibit individual choice, while still moving towards a more healthy food environment. By framing these policies as purchasing policies, public agencies can promote the responsible use of taxpayer dollars while simultaneously making the healthy choice the easy choice for meeting attendees and role modeling healthy behaviors for the community at large.

**Recommendations and best practices**

A variety of obstacles and areas for improvement were revealed by this evaluation, as were various agencies’ ways of addressing these barriers. One of the dominant overall findings was that the policy process around healthy meetings does not look the same in any two agencies, indicating that universally recommended “best practices” may not always be helpful. The scope or magnitude of a healthy meetings policy, in addition to the amount of time and effort policy development takes, appears to depend greatly on the culture of health already existing at an agency, and on the political climate of the workplace. Additionally, the workforce capacity needed to facilitate the policy process will differ from site to site and will depend on the agency’s structure and ability to write staff time into a particular grant or dedicate some work hours to policy coordination.

In spite of the different processes and worksite characteristics, the most common themes revealed in the evaluation led to the following general recommendations (see also *Lessons Learned* on page 19):

* Gauge employee readiness for various versions of the policy and provide multiple opportunities for participation in the policy development process.
* Work to get leadership buy-in from the beginning of the process.
* Engage in clear communication with contractors and vendors throughout policy development and implementation.
* Build capacity for some staff time dedicated to policy development and work to ensure sustainability of policy committees or advisory groups.
* Plan for multiple iterations of the policy; use policy language allowing for updates based on new needs, updated dietary guidelines, changes in worksite culture, and changes in food availability.
* Include an educational component at all meetings and events with non-employee participants to ensure that attendees understand the motivations for the policy.
* When planning physical activity at meetings or events, use an instructor that attendees are familiar and comfortable with.
* Stress employee empowerment, and not restriction of choice, when promoting the policy.
* Provide training to all affected parties regarding the definition of “healthy food.”

As revealed by this evaluation, sometimes providing more food options rather than less is a necessary first step. In addition, including a physical activity component in the policy can be challenging, but is an important tool for promoting health, particularly in worksites that are primarily sedentary or in agencies that host many meetings or events of long duration.

Because policy work is by nature incremental, a wide lens must sometimes be used to see the impact of the policy, and to remember that sometimes a series of small changes, rather than a single large change, is the most effective means to promote health within the employee population.

*“A challenge of implementation…it’s the culture issue…getting people to remember the policy and to communicate it in a way…to be supportive of people. Nutrition is such a touchy subject…it’s about finding a balance, because you don’t want people to feel isolated [by the policy].” –* Respondent #4

**Areas for further research**

Successful implementation of the physical activity requirement of healthy meetings policies remains an area without much guidance. A review of the available resources and research demonstrates that while increased physical activity in the workplace is a common recommendation, suggestions for how to increase participation in structured physical activities during meetings or conferences are very much lacking. Some suggestions were revealed in this evaluation, but encouraging participation still remains an obstacle. As more worksites incorporate physical activity into their meetings, events and conferences, additional evaluations can provide insight into successful ways to incentivize and increase participation. Ideally these insights will also provide the groundwork for helpful sample policy language as well as tips for effective implementation.

**Resources**

Healthy Food Options for a Healthier Workplace, Oregon Nutrition Policy Alliance

<http://www.orphi.org/download/PDF/onpahealthyfood.pdf>

Wellness@Work, Oregon Public Health Institute

<http://www.wellnessatworkoregon.org/>

Healthy Meetings Policies, California Department of Public Health

<http://www.cdph.ca.gov/programs/cpns/Documents/Network-FV-WP-HealthyMeetingPolicies.pdf>

Energize Your Meetings, Washington State Department of Health

<http://here.doh.wa.gov/materials/energize-your-meetings/13_EnergzMtg_E11L.pdf>

Guidelines for Offering Healthy Foods at Meetings, Seminars and Catered Events, University of Minnesota School of Public Health

<http://www.sph.umn.edu/pdf/news/pubs/NutritionGuide2009.pdf>

**Appendices**

**Appendix A: Informed consent for study participation**

**Healthy Meetings Policy Evaluation**

1. **Why are you invited to take part in this research?**

The Oregon Public Health Division promotes policies and programs that help employees achieve their personal health goals by eating better, moving more, quitting tobacco, and making the best use of their health care benefits. As part of this broad initiative, we are seeking to capture insights into the process behind healthy meetings policies and guidelines being developed and implemented by organizations in Oregon. The information collected during this evaluation will be used to help develop best practices and make policy recommendations. The results of the evaluation, including quotations provided during interviews, will be compiled into a final report that will be used by the Oregon Health Authority and made available to any other interested agencies.

1. **Who is doing the study?**

The evaluation is being carried out on behalf of the Oregon Public Health Division’s Health Promotion and Chronic Disease Prevention Section (HPCDP). This evaluation project constitutes the graduate field experience of Elizabeth (Liz) Stuart, a Master of Public Health candidate at Portland State University, who will be conducting the majority of the evaluation activities.

1. **What are you being asked to do?**

You are being asked to participate in a semi-structured interview. The interview will be conducted either in person, over the phone, or via an internet-based audio/video program like Skype. The interview should take 1 to 1 ½ hours. The interviewer will read open-ended questions from a paper for you to answer, and the entire interview will be recorded. During the interview, you will be asked questions about your agency’s healthy meetings policy or guidelines, including policy content, the policy development and implementation process, and successes and challenges experienced in relation to the policy/guidelines. You will also be asked about other worksite wellness programs/policies at your agency. No personal information will be collected.

1. **What are the possible risks and discomforts of being interviewed?**

It is possible that answering questions relating to challenges and barriers to policy development/implementation may make you uncomfortable. If you agree to participate in the interview, you will NOT be required to answer any question that makes you uncomfortable. At any point in time you may stop the interview completely or take a break. The other risk is that your name or affiliation may be associated with a statement or quotation you provide during the interview. To ensure that you are comfortable with being identified as the source of a statement or quotation, the interviewer will send you a summary of your interview, highlighting statements and quotations to be used in the final report. You will have a chance to review these statements for accuracy and request that your name/affiliation not be associated with a particular statement. The interviewer will check with you to confirm the meaning of any unclear statements.

1. **Are there any benefits to your being interviewed?**

By participating in the interview, you can help the Oregon Health Authority, Public Health Division and HPCDP to understand what works and what doesn’t in developing and implementing healthy meetings policies/guidelines in government agencies. The interview will provide you with an opportunity to share your experiences, and your input will contribute to the development of a healthier workforce and a culture of health in worksites of all types and sizes in Oregon.

1. **Do you have to take part in this interview?**

No. Your participation is completely voluntary. The choice of whether to participate in this study is completely up to you. No one will be upset or angry if you decide not to participate. It will not affect your relationship with the Public Health Division or HPCDP in any way. If you decide to participate in the study, you can refuse to answer any of the questions asked in the interview.

1. **Will information about you be confidential?**

Because the information provided in the interview regards your professional activities, it is not afforded the same confidentiality measures necessary for personal information. All written records and voice recordings of your interview will be kept in a locked drawer, and all transcriptions and reports will be kept on a password-protected computer. However, once you have had a chance to review and confirm the summary of your interview and any quotations or statements used in the final report, that information will be made public.

1. **Will we contact you again?**

You will be contacted by email within four weeks after the interview. You will be presented with a typed summary of your interview, providing themes, highlights, and any statements or quotations the interview wishes to use in the final evaluation report. This will be your opportunity to ensure that your statements are being accurately represented.

1. **What should you do if you have any questions?**

If you have any questions about the project you can email Liz Stuart at Elizabeth.M.Stuart@state.or.us or (971) 673-1052 or you can contact Liz’s supervisor at HPCDP, Kim LaCroix, at Kimberly.W.LaCroix@state.or.us or (971) 673-0606. Both individuals work from the Public Health Division office at 800 NE Oregon Street, Suite 730, Portland, OR 97232. Additionally, you can contact your community or tribal liaison at HPCDP.

Do you have any questions that might help you decide whether or not you want to participate in the study? By signing below, you are agreeing to participate in the study. Please sign only if:

* You understand the information about the study in this consent form,
* You have had all of your questions answered fully,
* You want to participate in the study.

PARTICIPANT’S STATEMENT

I agree to participate in this interview. I understand that my participation is voluntary and will not affect my relationship with HPCDP. I understand that I can stop participating at any time or refuse to answer questions asked of me. I have received a copy of this form.

Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Company/ Affiliation\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(PLEASE PRINT)

Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Appendix B: Healthy meetings policy interview guide for public agencies**

Thank you for taking the time to talk to me today. This interview should take about an hour.

You’ve read and signed the consent form, which contains all the background information for this project. We are seeking to capture insights into the process behind the development and implementation of healthy meetings policies and guidelines, which we define as any guidelines or rules that promote healthy eating and physical activity at meetings, events, or conferences.

This interview will focus on four areas of interest: Policy Content, Policy Process, Policy Impact, and Successes/Challenges.

Your participation in this interview is completely voluntary. You have the right to answer these questions at your discretion, and may choose to not answer a question or to end the interview at any time without judgment or penalty.

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 *(\*denotes a priority question)*

Background Info

* Please start by briefly describing your position and responsibilities in regards to healthy meetings.
* Do you plan meetings/events and organize catering internally, or does another department or contractor do that?
* Are your healthy meetings guidelines mandated by grant funding, or were they developed independently of any grant requirements?

Policy Content

* \*Tell me about your healthy meetings policy **[or ideas/concepts for a policy]** and its components **[as they exist at this stage in the process].** *[Nutrition standards/physical activity]*
	+ **[IF not already covered]** Does your policy contain provisions regarding environmental sustainability? If so, what kind?
		- Preference for local vendors?
	+ \*What stage are you at with this policy, in terms of development or implementation?
		- **[IF not yet implemented]** What is the proposed timeline/phase-in procedure for implementing this policy?
		- **[IF implemented]** How long has it been in place?
	+ \*What agencies/departments/offices does your healthy meetings policy apply to? **OR** What agencies/departments/offices are you planning to have this policy apply to?

Policy Process

* \*Tell me about the process of developing the policy.
	+ What motivated your agency to develop this policy in the first place?
	+ What about stakeholders? Who was involved in developing this policy?
	+ Is this policy the result of a broader wellness initiative or program? A freestanding policy/first step towards something broader?
	+ What kind of assessment(s) was done to determine what was feasible for your agency/worksite?
	+ What kind of longer term goals or plans do you have regarding healthy meetings?
		- If this policy goes well, will you expand it in some way?
* Please describe the role of the management/agency leadership in developing, implementing and promoting the policy.
* \*Please describe the process of implementing the policy
	+ How were employees notified about the policy?
	+ Were trainings provided?
	+ How many sites/employees are affected?

Policy Impact

* How has the policy been received by employees?
	+ By participants in meetings and events who are not employees?
* How has the policy been received by any vendors/caterers that your site uses to source food for meetings/events?
	+ Was it easy for them to comply with the standards?

Challenges/Barriers/Successes

* \*Tell me about any challenges or barriers you encountered during the process of development or implementation.
	+ How are you dealing with them?
* \*Please describe any notable successes you have experienced in developing and implementing the policy.
	+ Do you have any specific stories or anecdotes to share?
* What particular characteristics of your site have played into the policy process here?
* What, if anything, would you do differently during this process if you had the chance to go back and redo it?

Wrap-Up

* \*How has this policy changed your worksite?
	+ What impact has it had on people’s thinking and actions around health?
	+ Can you briefly tell me about any other worksite nutrition policies you have in place?
* Is there any other information or comments you would like to add, that we haven’t already covered?

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Thanks again for taking the time to talk to me. Please feel free to contact me at any time if you wish to clarify a statement or if you have any other questions or concerns.

**Appendix C: Healthy meetings policy interview guide for vendor personnel**

Thank you for taking the time to talk to me today. This interview should take about an hour.

You’ve read and signed the consent form, which contains all the background information for this project. We are seeking to capture insights into the process behind the development and implementation of healthy meetings policies and guidelines, which we define as any guidelines or rules that promote healthy eating and physical activity at meetings, events, or conferences.

Your participation in this interview is completely voluntary. You have the right to answer these questions at your discretion, and may choose to not answer a question or to end the interview at any time without judgment or penalty.

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*[\*denotes a priority question]*

Background Info

* Please start by briefly describing your position and responsibilities in relation to working with HPCDP.

Policy Process

* \*Tell me about working with HPCDP to accommodate the healthy meetings guidelines.
	+ What was your initial reaction to the guidelines?
* Have you noticed any differences among HPCDP staff in adhering to the guidelines when planning events [without naming names]?
* \*Can you talk specifically about accommodating the guidelines’ requirements for physical activity?
	+ The option for physical activity requirements isn’t currently on the request form; how does that affect the process of accommodating them?
* \*Describe your involvement in HPCDP’s policy development process
	+ Were you approached regarding the potential changes, or just informed that they were happening?
* \*HPCDP's guidelines were enacted in 2009 (but were implemented unofficially prior to that); how has [your experience of?] implementation changed over the past 4-5 years?
* How does HPCDP support you [Beatty Group?] in accommodating these guidelines?
* Can you describe any opinions you have heard from your co-workers (who may not be as closely involved in the process) related to the guidelines?
* What experiences have you had with other **government** agencies that use a healthy meetings policy?
	+ Or sustainable sourcing?

Policy Impact

* \*What kind of impact, if any, has the healthy meetings guidelines at HPCDP had on your company?
* Has your experience with HPCDP’s guidelines changed how you work with other clients? How so?

Challenges/Barriers/Successes

* \*Tell me about any challenges or barriers you encountered during the policy development process or in complying with the guidelines.
	+ Are there any differences in complying with this guidelines in urban versus rural areas of the state? If so, do you have tips you can share to improve implementation.
	+ How are you dealing with these obstacles?
* \*Please describe any notable successes you have experienced relating to the guidelines.
* Do you have any specific stories or anecdotes to share regarding working with HPCDP’s healthy meetings guidelines?

Wrap-Up

* Is there any other information or comments you would like to add, that we haven’t already covered?

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Please feel free to contact me at any time if you wish to clarify a statement or if you have any other questions or concerns.

**Appendix D: Healthy meetings policy interview guide for tribal health services**

Thank you for taking the time to talk to me today. This interview should take about an hour.

You’ve read and signed the consent form, which contains all the background information for this project. We are seeking to capture insights into the process behind the development and implementation of healthy meetings policies and guidelines, which we define as any guidelines or rules that promote healthy eating and physical activity at meetings, events, or conferences.

This interview will focus on overall worksite wellness initiatives, as well as healthy meetings guidelines.

Your participation in this interview is completely voluntary. You have the right to answer these questions at your discretion, and may choose to not answer a question or to end the interview at any time without judgment or penalty.

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*(\*denotes a priority question)*

Background Info

* Please start by briefly describing your position and responsibilities regarding worksite wellness with the Coquille Tribe.

Policy Content

* \*Tell me about your worksite wellness program and its components.
	+ How many sites/employees are affected?
* Tell me about your plans regarding healthy meetings guidelines.
	+ Are these guidelines mandated by grant funding, or were they developed independently of any grant requirements?
	+ \*What stage of development are your guidelines currently at?
		- What is the proposed timeline/phase-in procedure for implementing this policy?
	+ \*Do you know what agencies/departments/offices your healthy meetings policy will apply to?
		- \*How many sites in total?

Policy Process

* \*Tell me about the process of developing your worksite wellness programs.
	+ What motivated your agency to develop these programs in the first place?
	+ Who are/were the stakeholders involved in developing the programs?
	+ Please describe the role of the tribal leaders in developing, implementing and promoting the programs.
* How were employees/tribal members notified about the worksite wellness programs/policies?
	+ Were trainings provided?
* Is your healthy meetings policy planned as a component of the overall wellness initiative?
	+ What kind of assessment(s) are planned to determine what is feasible for your agency/worksite (re: healthy meetings)?
	+ What kind of longer term goals or plans do you have regarding healthy meetings?
		- If this policy goes well, will you expand it in some way?

Policy Impact

* How have the worksite wellness programs been received by employees?
	+ By tribal members who aren’t employees?
* **(If applicable)** How has the policy been received by those who prepare the food for meetings/events?
	+ By the vendors/caterers that the tribe uses to source food for meetings/events?

Challenges/Barriers/Successes

* \*Tell me about any challenges or barriers you encountered (or are encountering) during the development and implementation of your worksite wellness programs.
	+ How are you dealing with them?
* \*Please describe any notable successes you have experienced in developing and implementing the programs.
	+ Do you have any specific stories or anecdotes to share?
* What particular characteristics of your site have played into developing and implementing the programs here?
* What, if anything, would you do differently during this process if you had the chance to go back and redo it?

Wrap-Up

* How has your worksite wellness initiative changed your worksite(s)?
	+ What impact has it had on people’s thinking and actions around health?
* Is there any other information or comments you would like to add, that we haven’t already covered?

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Thank you once again for participating in this project. Please feel free to contact me at any time if you wish to clarify a statement or if you have any other questions or concerns.

**Appendix E: PRECEDE-PROCEED framework**



Retrieved from the University of Kansas Community Tool Box, <http://ctb.ku.edu/en/tablecontents/sub_section_main_1008.aspx>

1. Denotes a theme also found in the tribal health services interview. See page 23 for more information. [↑](#footnote-ref-1)
2. Denotes a theme found in the interviews with Beatty Group staff. See page 26 for more information. [↑](#footnote-ref-2)