



# The CDC Worksite Health ScoreCard:

An Assessment Tool for Employers to Prevent Heart Disease, Stroke, & Related Health Conditions



## Health ScoreCard Manual

Updated January 2014

National Center for Chronic Disease Prevention and Health Promotion  
Division for Heart Disease and Stroke Prevention





## FOREWORD

The purpose of this manual is to assist employers with using *The CDC Worksite Health ScoreCard (HSC)* to assess their health promotion programs, identify gaps, and prioritize high-impact strategies to prevent heart disease, stroke, and related conditions. CDC believes worksite health promotion and wellness programs are essential to maintaining a healthy workforce.

This manual is for CDC guidance only. It does not establish or affect legal or administrative rights or obligations. References within this manual to any specific commercial products, processes, services by trade names, trademarks, or manufacturers do not constitute an endorsement or recommendation by the CDC.

Both *The CDC Worksite Health ScoreCard* manual and tool, in their current forms, may be updated and revised at any time.

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and Related Health Conditions**

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# ACKNOWLEDGEMENTS AND SUGGESTED CITATION

## Acknowledgements

Development of *the CDC Worksite Health ScoreCard (HSC)* was made possible through the time and expertise provided by the work group members listed below.

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Special thanks to Andrew P. Lanza, MPH, MSW, CCHP<sup>13</sup>/NCCDPHP,<sup>1</sup> Joel K. Kimmons, PhD, CCHP<sup>13</sup>/NCCDPHP<sup>1</sup>/DNPAO,<sup>9</sup> Terry F. Pechacek, PhD, CCHP<sup>13</sup>/NCCDPHP,<sup>1</sup> Steven L. Sauter, PhD, NIOSH<sup>6</sup>/DART,<sup>10</sup> and William H. O'Brien, PhD, ABPP, Bowling Green State University for their contributions as subject matter experts in providing strength of evidence and impact ratings for questionnaire items related to diabetes, tobacco, stress management, and depression, respectively.

We also would like to give special thanks to Jessica Allen MPH, MSW, NCCDPHP/DNPAO<sup>9</sup> for her contribution as subject matter expert and leadership on the development of the Lactation Support topic; Carolyn Bridges, MD, ISD/NCIRD<sup>14</sup> and Susan Farrall, ISD/NCIRD<sup>14</sup> for their development of the Vaccine-Preventable Diseases topic; as well as Suzanne Nobrega, MS; and Nicholas Warren, ScD, MAT for their development of the Occupational Health and Safety topic and Viridian Health Management, particularly Andy Spaulding, for their input on the new module topics and for conducting the validation testing within the National Healthy Worksite Program.

We appreciate the time and effort that members of the National Business Coalition on Health (NBCH) and National Safety Council (NSC), and representatives of the State Heart Disease and Stroke Prevention Programs contributed to recruiting employers for this study. Lastly, we thank all of the employers who pilot tested *The CDC Worksite Health ScoreCard*.

### **Suggested Citation**

Centers for Disease Control and Prevention. *The CDC Worksite Health ScoreCard: An Assessment Tool for Employers to Prevent Heart Disease, Stroke, and Related Health Conditions*. Atlanta: U.S. Department of Health and Human Services; 2014.

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# INTRODUCTION

## **What is *The CDC Worksite Health ScoreCard*?**

The CDC Worksite Health ScoreCard (HSC) is a tool designed to help employers assess whether they have implemented **evidence-based health promotion interventions or strategies** in their worksites to prevent heart disease, stroke, and related conditions such as hypertension, diabetes, and obesity. The tool was developed by the CDC Division for Heart Disease and Stroke Prevention in collaboration with the Emory University Institute for Health and Productivity Studies (IHPS), the Research Triangle Institute, the CDC National Center for Chronic Disease Prevention and Health Promotion (NCCDPHP) Workplace Workgroup, and an expert panel of federal, state, academic, and private sector (individuals who contributed to the development of the CDC Worksite HSC are listed on page 3-4). To ensure the validity and reliability of the tool, a validation study was conducted by Emory University's IHPS on the tool's original 12 modules. This study involved a national sample of 93 employers of variable size who agreed to pilot test the survey and provide feedback on the survey's content and structure. In 2013, four additional modules were developed and tested using a similar protocol as the original validation study. For more information on how the tool was developed and validated, please refer to the Frequently Asked Questions (FAQs) in Appendix A.

## **Why Use *The CDC Worksite Health ScoreCard*?**

The United States is facing an unparalleled health epidemic, driven largely by chronic diseases that are threatening American businesses' competitiveness because of lost productivity and unsustainable health care costs. The medical care costs of people with chronic diseases was reported in 2009 to account for more than 75% of the nation's \$2.2 trillion medical care costs.<sup>1,2</sup> For example:

- Heart disease and stroke, which are the primary components of cardiovascular disease (CVD), are the first and fourth leading causes of death in the United States. They are responsible for one of every three (more than 800,000) reported deaths each year.<sup>3</sup> CVD is responsible for 17% of national health expenditures, and as the US population ages, these costs are expected to increase substantially.<sup>4</sup> In 2010, annual direct and overall costs resulting from CVD in the United States were estimated at \$273 billion and \$444 billion, respectively.<sup>4</sup>
- In 2008 dollars, the medical costs of obesity were estimated at \$147 billion.<sup>5</sup>
- In 2007, the economic costs related to diabetes were estimated at \$174 billion including \$116 billion in direct medical expenses and \$58 billion in indirect costs attributed to disability, work loss, and premature mortality.<sup>6</sup>
- Between 2000–2004, the economic costs related to tobacco use were estimated at \$192.8 billion per year including \$96 billion per year in direct medical costs and \$96.8 billion per year in lost productivity.<sup>7</sup>

Although chronic diseases are among the most common and costly of all health problems, adopting healthy lifestyles can help prevent them. A wellness program aimed at keeping employees healthy is a key long-term human asset management strategy. To curb rising health care costs, many employers are turning to workplace health programs to make changes in the worksite environment, help employees adopt healthier lifestyles and, in the process, lower their risk of developing costly chronic diseases.

The approach that has proven most effective is to implement an **evidence-based comprehensive health promotion program** that includes individual risk reduction programs, coupled with environmental supports for healthy behaviors, and is coordinated and integrated with other wellness activities.<sup>8-10</sup> However, only 6.9% of employers offer a comprehensive worksite health promotion program, according to a 2004 national survey.<sup>11</sup>

Several studies have concluded that well-designed worksite health promotion programs can improve the health of employees and save money for employers instituting these programs. For example:

- In 2005, Chapman summarized results from 56 qualifying financial impact studies conducted over the past two decades and concluded that participants in workplace programs had 25%–30% lower medical or absenteeism expenditures than non-participants.<sup>12</sup>
- In 2010, Baicker et al. published a literature review in *Health Affairs* focused on cost savings garnered by worksite wellness programs. The investigators found the medical costs return on investment (ROI) to be \$3.27 for every dollar spent and the absenteeism ROI to be \$2.73 for every dollar spent.<sup>13</sup>

*Note: Worksite health promotion programs may take 2 to 5 years to realize positive ROIs.*<sup>14-16</sup>

While employers have a responsibility to provide a safe and hazard-free workplace, they also have abundant opportunities to promote individual health and foster a healthy work environment. CDC encourages employers to provide their employees with preventive services, training and tools, and an environment to support healthy behaviors.

*The CDC Worksite Health ScoreCard* includes questions on many of the key evidence-based and best practice strategies and interventions that are part of a comprehensive worksite health approach that address the leading health conditions driving health care and productivity costs.

### **Who can use *The CDC Worksite Health ScoreCard*?**

Employers, human resource managers, health benefit managers, health education staff, occupational nurses, medical directors, wellness directors, or others responsible for worksite health promotion in an organization can use *The CDC Health ScoreCard* to establish benchmarks and track improvements (evaluation) over time. State or local health departments may assist employers and business coalitions in using the tool and help find ways to establish healthier workplaces. State or local health departments also can use the tool for monitoring worksite practices, establishing best practice benchmarks, and to track improvements in worksite health promotion programs over time to more effectively direct resources to support employers.

### **What can *The CDC Worksite Health ScoreCard* tell you?**

The tool contains 125 questions that assess how evidence-based health promotion strategies are implemented at a worksite. These strategies include health promoting counseling services, environmental supports, policies, health plan benefits, and other worksite programs shown to be effective in preventing heart disease, stroke, and related health conditions. Employers can use this tool to assess how a comprehensive health promotion and disease prevention program is offered to their employees, to help identify program gaps, and to prioritize across the following health topics:

- Organizational Supports (18 questions)
- Tobacco Control (10 questions)
- Nutrition (13 questions)
- Lactation Support (6 questions)
- Physical Activity (9 questions)
- Weight Management (5 questions)
- Stress Management (6 questions)
- Depression (7 questions)
- High Blood Pressure (7 questions)
- High Cholesterol (6 questions)
- Diabetes (6 questions)
- Signs and Symptoms of Heart Attack and Stroke (4 questions)
- Emergency Response to Heart Attack and Stroke (9 questions)
- Occupational Health and Safety (10 questions)
- Vaccine-Preventable Diseases (6 questions)
- Community Resources (3 questions; not scored)

## Steps for Using the Health ScoreCard to Improve Your Worksite's Health Promotion Programs

1. Complete the *CDC Worksite Health ScoreCard (HSC)* using the instructions in the next section of this manual. See page 8.
2. Calculate your worksite's scores using the scoring guide on page 9.
3. Review your HSC scores and use them as a planning tool. Your scores are intended to assist you in prioritizing strategies as you set near- and long-term goals for developing your worksite's comprehensive health promotion program. Review your scores to identify potential gaps in your worksite's health promotion program (that is, topic areas where your organization currently has few strategies in place).
4. Determine and prioritize which strategies your worksite will implement.
  - a. Identify the highest impact strategies not currently in place at your worksite.
  - b. Use this information and your scores to prioritize future strategies that are relevant, feasible, and consistent with your organization and employee needs, health issues, and health promotion budget.
  - c. Identify which of your priority strategies are feasible for short- or long-term accomplishments.
  - d. Use this information to develop an Annual Worksite Health Improvement Plan and Budget (Appendix E).
5. Consult the Resources for Action section (Appendix B) in this report for guidance on developing strategies.
6. Contact your State Health Department for technical assistance as needed to improve your worksite health promotion program. State Health Departments can be valuable resources for offering additional tools and resources as well as for providing technical guidance around program design, performance, and evaluation; check with your local health departments for more information. You may find contact information for your state program at <http://www.cdc.gov/workplacehealthpromotion/organizations/index.htm> <http://www.chronicdisease.org/search/>
7. Create a baseline report to demonstrate progress in adopting these strategies over time. Complete the survey again in a year to document and report progress. You also may evaluate how your HSC scores correlate with improvements in aggregated health risk scores among employees who were exposed to the strategies.
8. Inform and educate employees and management about your organization's health promotion program by presenting and disseminating your worksite's HSC scores.

## Instructions

### Instructions for completing *The CDC Worksite Health ScoreCard*

- Answer “yes” or “no” for each question on the tool. Consult the Glossary (Appendix C) to help you understand terms used in the questions. All questions should be answered consistently with your worksite practices and programs that are currently in place (i.e., on-going activities, services) or have occurred within the last 12 months (e.g., annual 12-week walking challenges).
- There are 16 topic sections to the tool; you may complete each section in separate sittings and in any order. Individual topic scores can be tallied for each section and combined for a total HSC score once all sections are completed. The entire survey will take approximately 30 minutes to complete.
- We recommend that you form a small team, representing different organizational units to complete this survey together. A team-based approach will allow for more accurate responses, increase ownership and involvement amongst the team, and decrease effort for any single team member. Because a strong knowledge of your organization and its health promotion program(s) is recommended to accurately complete the tool, strive to pick team members who occupy the following positions:
  - Members of a worksite health promotion committee
  - Human resource managers
  - Health benefits managers
  - Health education staff
  - Occupational nurses
  - Medical directors
  - Wellness directors
  - Health promotion coordinators
  - Building facilities managers

*Note: If completing as a group/team, find consensus on the responses to questions before finalizing scores.*

- Scan each section before attempting to respond. Answers to most questions are readily available following a review of organizational health policies (e.g., a policy handbook), benefit plan designs, interviews with key stakeholders, and direct observation. In some cases, answers may not be immediately obvious to the person assigned to complete the section. If you do not know the answer to the question, leave the box empty, and then engage others at the worksite to help you answer it.
- Some questions ask you to describe your health insurance plan. If your organization offers more than one health insurance option, base your responses on the health insurance plan with the highest enrollment.
- Throughout the survey, questions refer to “health promotion” at your worksite. This also is known as “worksite wellness” or “wellness programs.”
- If you are a large organization with multiple worksites, consider completing this tool for each worksite separately, or select the particular worksite of interest. A worksite is a building, unique location, or

business unit within the organization where work occurs. A worksite can include a campus of multiple buildings as long as all the buildings are in close proximity (walking distance) and defined as part of the organization. For example, a shipping company should consider a single retail store, distribution center, or corporate office park as an individual worksite unless they are geographically adjacent. By completing the tool separately for each worksite, you can identify different areas of strengths and opportunities for improvement across the worksites within your organization.

- After completing the HSC tool and scoring your answers, you can compare your scores with employers that participated in the validation study. The HSC Validation Study Benchmarking Report on page 40 summarizes the total and individual topic scores of a convenience sample of 93 worksites across the United States. For a sample of an individualized benchmarking report that employers who participated in the validation study received, please review <http://web1.sph.emory.edu/ihrs/projects.php#7>. You can also benchmark against the group of employers who participated in testing the four additional modules on page 45.
- **Do not interpret this benchmark as a recommended score. It is intended to provide a reference where your worksite stands compared to a small sample of other worksites.**

## Scoring Your Survey

The *CDC Worksite Health ScoreCard* scoring system was developed to reflect the relative impact of proven health promotion strategies. Each item on the HSC survey has been assigned a point value between 1 and 3 (where 1=good, 2=better, and 3=best). This point value reflects the level of impact that the strategy has on the intended health behaviors or outcomes *and* the strength of scientific evidence supporting this impact. For example, awareness-building materials such as brochures (1 point) have less of an affect on employee health than lifestyle counseling or self-management programs (3 points). For more information about the evidence and impact rating systems, please see Appendix D. For the citations used as evidence to assign scores for each of the items on the HSC, please see *The CDC Worksite Health ScoreCard Scoring Methodology: Evidence and Impact Ratings and Supporting Citations*.

The HSC tool below shows the point value that is assigned to each strategy. When scoring your completed HSC, you will be able to determine two scores—a total HSC score and individual scores for each of the 16 topic sections.

- To calculate your total HSC score, add the point values of all the questions to which you responded YES.
- To calculate individual topic section scores, add the point values of all of the questions to which you responded YES in a particular section (e.g., organizational supports).
- Questions that are skipped are counted as “no,” whether or not the strategy is applicable to your worksite. You will receive 0 points for skipped questions. When you review your total HSC score and individual topic scores, please keep in mind that your scores may be lower because of the questions that were not applicable to your worksite.

# The CDC Worksite Health ScoreCard: An Assessment Tool to Prevent Heart Disease, Stroke, and Related Conditions Worksheet

## OPTIONAL BACKGROUND INFORMATION

This section of the tool may be used to capture demographic information about your worksite's population. Please complete the contact information section if you are completing this tool for a state health department or are working with other partners. If you want to skip this section, please proceed to page 14 to begin completing the HSC.

### 1. CONTACT INFORMATION

Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone number: \_\_\_\_\_

E-mail address: \_\_\_\_\_

### 2. EMPLOYEE CHARACTERISTICS

#### 2a. Number of employees

< 100       100–249       250–749       ≥750

#### 2b. Sex

% Male \_\_\_\_\_

% Female \_\_\_\_\_

#### 2c. Age group

% <18 years of age \_\_\_\_\_

% 18–34 years of age \_\_\_\_\_

% 35–44 years of age \_\_\_\_\_

% 45–64 years of age \_\_\_\_\_

% ≥65 years of age \_\_\_\_\_

**2d. Average Age**

Years of age \_\_\_\_\_

**2e. Racial/ethnic group**

% Non-Hispanic White \_\_\_\_\_

% Non-Hispanic Black/African American \_\_\_\_\_

% Hispanic/Latino \_\_\_\_\_

% Asian/Asian American \_\_\_\_\_

% American Indian/Alaska Native \_\_\_\_\_

% Native Hawaiian/Pacific Islander \_\_\_\_\_

% Other \_\_\_\_\_

**2f. Work status**

% Full-time \_\_\_\_\_

% Part-time \_\_\_\_\_

% Temporary \_\_\_\_\_

**2g. Job type**

% Salaried \_\_\_\_\_

% Hourly \_\_\_\_\_

**2h. Education level**

- % Less than high school \_\_\_\_\_
- % High school graduate/GED \_\_\_\_\_
- % Some college/technical school \_\_\_\_\_
- % College graduate \_\_\_\_\_
- % Post-graduate/advanced degree \_\_\_\_\_

**3. Your Organization's Business Type**

- For-profit
- Nonprofit/government
- Nonprofit/other

**4. Your Organization's Industry Type:**

- |   |   |
|---|---|
| <input type="checkbox"/> Agriculture, Forestry, Fishing and Hunting     | <input type="checkbox"/> Information  |
| <input type="checkbox"/> Mining, Quarrying, and Oil and Gas Extraction  | <input type="checkbox"/> Construction   |
| <input type="checkbox"/> Retail/Wholesale Trade                         | <input type="checkbox"/> Educational Services   |
| <input type="checkbox"/> Accommodation & Food Services                  | <input type="checkbox"/> Manufacturing  |
| <input type="checkbox"/> Professional, Scientific, & Technical Services | <input type="checkbox"/> Administrative & Support & Waste Management & Remediation Services |
| <input type="checkbox"/> Transportation, Warehousing, & Utilities       | <input type="checkbox"/> Arts, Entertainment, and Recreation                                |
| <input type="checkbox"/> Health Care & Social Assistance                | <input type="checkbox"/> Other Services (except Public Administration):<br>_____            |
| <input type="checkbox"/> Real Estate & Rental & Leasing                 |   |
| <input type="checkbox"/> Finance and Insurance                          | <input type="checkbox"/> Public Administration  |

**5. Health insurance coverage provided to employees?**

- Yes
- No



**6. Elements of worksite health promotion programs offered at your organization:**

*(check all that apply)*

- Health education (e.g., skills development and behavior change classes; awareness building brochures, posters)
- Links to related employee services (e.g., referral to employee assistance programs [EAPs])
- Supportive physical and social environment for health improvement (e.g., tobacco-free policies, subsidized gym memberships)
- Integration of health promotion into your organization's culture (e.g., health promotion being part of business' mission statement)
- Employee screenings with adequate treatment and follow up (e.g., Health Risk Assessments (HRAs) and biometric screenings)

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