



Guidance on Selecting Qualified Wellness Program Providers and Responding to Wellness Program Vendor Solicitations for NC State Government Worksite Wellness Programs

In developing Worksite Wellness Programs for state employees and teachers, wellness committees are encouraged to consider a number of issues before inviting any individual or business to provide health information or services to employees as part of their wellness program. These types of wellness programs include activities such as lunch and learn presentations on health-related topics, physical activity classes, or health screening services.

In selecting a vendor to provide a wellness presentation or program activity, the wellness committee should make a decision based on a number of factors:

- Does the vendor have credentials and experience in the relevant program area?
- Is the cost of the program accessible to most employees?
- Is the program recognized as evidence-based to promote wellness?
- Is the vendor available at times convenient for employees?
- Does the vendor have a demonstrated record of reliability in providing programs?

□ IDENTIFYING QUALIFIED PROGRAM PROVIDERS (VENDORS).

- Guest speakers or program activity providers should have the appropriate credentials and experience. National or state certification is recommended. Some types of programs may not have a recognized formal certification process.
- The NC HealthSmart Worksite Wellness Toolkit provides specific suggestions as to how to locate qualified local speakers/presenters on physical activity, healthy eating, stress, and tobacco cessation. <http://www.eatsmartmovemorenc.com/Resources/wwtoolkit/index.html>
- Additional resources for locating qualified wellness program providers might include wellness consultants in the Division of Public Health, professional associations, county health departments, county Cooperative Extension agents, university or community college faculty, community organizations such as the YMCA or American Heart Association, Healthy Carolinians consultants, and hospital health promotion programs.
- Wellness committees may receive solicitations from vendors offering programs or services that are not generally recognized as appropriate for worksite wellness programs. When there is any question about the appropriateness of any program or service, the wellness committee should consult with a health professional to determine if the type of program offered is recommended for worksite wellness programs. This might be a health professional within their organization or from the resources suggested in the prior bullet.
- If a committee plans to offer health screening services as part of their wellness program, it is recommended that only screening tests that are reimbursed by insurance plans be sponsored. This does not mean that an insurance plan will reimburse the vendor for onsite services, rather it is a way to validate the appropriateness of offering a particular screening test.

Also consider

- Does the vendor have proof of insurance?
- Is the vendor HIPAA compliant and able to provide appropriate employee consent documentation?
- Does the vendor provide a service that is time efficient and user friendly?
- Will the vendor provide one-on-one education about screening results?
- Does the vendor have written emergency and on-call policies?

- Committees can check to see if WeSave or the Blue Cross Blue Shield of North Carolina's (BCBSNC) Alt Med BlueSM program offered through the State Health Plan for Teachers and State Employees (SHP) has vendors that will offer programs at reduced costs to state employees. Alt Med BlueSM is available to members of the SHP or BCBSNC. For more information on WeSave, visit <http://www.wesave.com/nc/> and for Alt Med BlueSM, visit <https://www.bcbsnc.com/health-wellness/blue-extras/altmed/index.cfm>.

CONFLICT OF INTEREST ISSUES

- Vendors should not engage in the sale or promotion of any products or services as part of their presentation or program for state employees.
- Prior to any program, clarify with the vendor as to whether the presenter plans to contact participants after the presentation with any type of solicitation or information.
- Employees should be advised in advance regarding the use of any personal contact information collected by a vendor. Wellness committees should determine if a vendor plans to contact them and offer employees the option of not providing their contact information. Employees should also be advised in advance whether registering for a raffle or gift provided by the vendor will mean they may be contacted by the vendor with commercial offers.
- Employees should be made aware that they might have IRS tax liability for any cash or gift card incentive and possibly for incentive items of significant value such as a gym membership received as a raffle prize. Incentive items of small value, given infrequently, are usually considered exempt.
- It is strongly suggested that wellness committees collect the names of attendees and their work contact information for their records and future program recruitment.
- Wellness committees are not required to go through the state's competitive vendor bid process to provide a particular wellness program. However, committees who intend to pay vendors using committee or individual funds should make every effort to seek brief proposals from two competing vendors.
- Committees should keep documentation as to why a particular vendor was selected. This information will be useful for future wellness committee members and will also be useful should another vendor raise any question about equal access. It is also highly recommended that committees provide evaluation forms for employees in order to summarize program impact, ease of working with vendor, and participant satisfaction.
- If employees offer lunchtime wellness programs to other employees, the above recommendations still apply. The employee should also have permission of his or her supervisor to engage in this type of activity at work during non-work time. Employees should not use work time to provide this type of activity unless it is a scheduled program approved by management that will be offered to all employees during work time.

SAFETY & LIABILITY ISSUES

- If the vendor is providing a fitness activity, it is recommended that the instructor be certified in CPR by an appropriate agency, e.g., ACSM, ACE, NDITA, NSCA.
- Ensure that participating employees have signed an agency liability release form for participating in wellness activities. See <http://www.osp.state.nc.us/> for a sample liability form.
- Some vendors may also require that participants sign a liability form releasing the vendor from liability.

OTHER ISSUES

- The Wellness Committee should specify in writing the performance guarantees that the vendor has to meet to be paid.
- It is a good idea to identify in writing in advance, the responsibilities of the vendor and of the wellness committee. This would include agreement as to who is responsible for setting up, clean up after the program, advertising, providing any equipment such as a computer, projector, screen, and collection of any fees.