

DIRECTIVES CONTROL FORM - ORO O FINAL DIRECTIVE

PART A (To be completed by the Division of Primary Interest (DPI))

1. **NUMBER AND TITLE OF DIRECTIVE:** **ORO O 340, Chapter V, EMPLOYEE FITNESS PROGRAM**
2. **PURPOSE OF TRANSMITTAL:** New Directive Revised Directive Page Change
3. **THIS DOCUMENT MAY AFFECT THE WORK PERFORMED BY THE FOLLOWING CONTRACTORS:** (Check appropriate boxes)

No (all contractors)

Yes If yes, whom? LMES UT-B ORAU SURA
 Bechtel Jacobs Company

Other contractors (list by type)

Many ORO contractors have approved S/RIDs or WSS sets that may affect applicability of contractor requirements from this directive. Applicability of contractor requirements must take into account the approved standards set for each particular contract.

4. **SIGNIFICANT PROVISIONS:** Are there any significant changes or impact?

No Yes If yes, describe: This new Chapter establishes Chapter V in the ORO O 340 series.

5. **CONTACT POINT:** Richard W. Martin Technical Support Division, SE-32 576-9428
Name Organization Telephone

PART B (To be completed by the Directives Management Group (DMG)):

6. **FILING INSTRUCTIONS:**

<u>Remove</u>	<u>Dated</u>	<u>Insert</u>	<u>Dated</u>
n/a		ORO O Control Form	06/29/2000
		ORO O 340, Chapter V, Pages V-1 through V-12	06/29/2000

ORO Orders are available on the ORO Directives Management Home Page at http://www.ornl.gov/doe_oro_dmg/orchklst.htm. The ORO Orders will no longer be mailed in printed copy unless you do not have Internet capabilities.

7. **APPROVED FOR DISTRIBUTION IN ACCORDANCE WITH THE OFFICIAL DIRECTIVES DISTRIBUTION LIST:**

Original signed by

Kenneth W. Warden, AD-440
Signature Management Analyst, AD-440

06/29/2000
Date

INSTRUCTIONS TO ADDRESSEES: THIS FORM IS TO BE FILED WITH THE DIRECTIVE AND RETAINED

Rev. 04/01/2000

U.S. Department of Energy

Oak Ridge Operations

ORO O 340 Chapter V

DATE: 06/29/2000

SUBJECT: EMPLOYEE FITNESS PROGRAM

1. PURPOSE. This Chapter correlates to DOE 3790.1B, Federal Employee Occupational Medical Program, Chapter VIII, FEDERAL EMPLOYEE OCCUPATIONAL MEDICAL PROGRAM, dated January 7, 1993, by assigning responsibility and accountability and providing administrative guidance to ORO and Office of Scientific and Technical Information (OSTI). Nothing in this issuance changes any requirements contained in any DOE Order.
2. CANCELLATION. None.
3. APPLICABILITY. The provisions of this Chapter apply to all DOE-ORO employees, including those located in Oak Ridge and outlying localities to include the Portsmouth Site, Paducah Site, Thomas Jefferson National Accelerator Facility, and the Weldon Spring Site Offices. OSTI employees are not covered by the ORO Employee Fitness Program at this time, although employees of the DOE Office of Inspector General's Office in Oak Ridge are eligible to participate in the program.
4. RESPONSIBILITIES.
 - a. Manager
 - (1) Approves an ORO Wellness Committee within the ORO and ensures program conformance with referenced orders and guidance.
 - (2) Encourages maximum participation in individual fitness programs.
 - (3) Encourages maximum participation in office-sponsored health awareness programs.
 - b. Assistant Manager for Financial Management
 - (1) Ensures that adequate funds are provided in the annual budget submission for the Employee Fitness Program.
 - (2) Reimburses employees semiannually based on approved listing supplied by ORO Wellness Committee.
 - (3) Advises DOE Headquarters (HQ) Payroll on a quarterly basis of employee reimbursements for the Employee Fitness Program.
 - c. Office of Chief Counsel provides legal assistance to the ORO Wellness Committee, as necessary.

d. ORO Wellness Committee

- (1) Develops, implements, and maintains the ORO Employee Fitness Program policies and procedures and acts as the final arbiter of any employee dispute.
- (2) Recommends health club/fitness center approval status (see attachment 2) and provides assistance, information, and/or guidance to employees concerning local health clubs/fitness centers.
- (3) Conducts program audits and provides an annual report to the ORO Manager on the status of the program.
- (4) Develops procedures for the timely reimbursement of qualified employee expenses.

e. Union appoints sixty (60) percent of the Wellness Committee from bargaining unit members.

5. REQUIREMENTS AND PROCEDURES.

a. Program elements.

- (1) Individual Fitness. The establishment and maintenance of individual fitness programs have been shown to reduce the incidence of high blood pressure, heart disease, stress, and absenteeism in employee populations. These programs have also been shown to increase employee retention, recruitment, morale, and productivity within offices providing such benefits. The ORO Employee Wellness Committee will encourage the establishment and maintenance of employee fitness and exercise programs through the utilization of private health club/fitness centers.
- (2) The implementation date of this program will be on or about 15 November 1999.

b. Employee Responsibilities.

- (1) Each ORO employee is eligible for the fitness program and is responsible for obtaining his/her own membership in an approved health club/fitness center. Applications for participation will be accepted at anytime throughout the year, and reimbursement will cover the entire participation period. However, initial reimbursement will be made following the first full usage period (i.e., an employee joining in June will be reimbursed for 11 months the following May). Usage periods are defined as May 1 through October 31 and November 1 through April 30. See Attachment 3 for Application for Participation Form.

- (2) Because the government is providing a reimbursement, the employee must submit proof of payment with his/her submitted vouchers to the ORO Wellness Committee in order to receive reimbursement for initiation and/or membership fees up to \$200 per year. The amount of \$200 is a maximum amount payable for reimbursement of one year membership in a fitness program at an approved facility and payment will be made at six month intervals. The Government will only reimburse for the costs of the employee's fitness program. If the employee elects to obtain a family membership, the fitness center must provide documentation regarding how much of the total cost or fee for the family represents the employee's membership portion. See Attachment 4 for the Voucher form.
- (3) The start date for the first usage period is November 1, 1999. The ORO Wellness Committee will review submitted vouchers at the end of the first and each subsequent six-month usage period. Upon verification of satisfactory proof of usage, the Wellness Committee will submit a report to the proper ORO office, and the Government will then reimburse the employee for half of the total annual stipend.
- (4) Reimbursement is contingent on evidence that the employee utilized the health club/fitness center facilities an average of at least once a week (i.e., minimum 26 times during a usage period). The Wellness Committee will establish guidelines for usage exceptions due to travel, vacation, and/or illness. See Attachment 5 for an example Attendance Form which may be used.
- (5) Groups of ORO employees who wish to join the same health club/fitness center may consider inquiring about group/corporate rates or discounts for Federal employees.
- (6) In the event that, due to unforeseen circumstances, the employee is not able to utilize his/her membership for the prescribed number of times in a year, he/she should notify the ORO Wellness Committee for evaluation of the situation. Employees should consider including an "escape clause" in the contract they sign. Such a clause allows for termination of the contract if the employee can no longer participate because of medical reasons or transfer to another location.
- (7) If for any reason it becomes necessary for a member to stop utilizing the health club/fitness center, the ORO Wellness Committee should be notified.
- (8) An employee terminating employment forfeits his/her participation and any reimbursement for the usage period in which the termination occurs.

- (9) Employees will submit request for reimbursements at the end of each six month usage period during reimbursement periods of May 1-15 and November 1-15 of each year.

c. Program Review.

The ORO Wellness Committee will review, approve, and submit to Oak Ridge Financial Service Center (ORFSC) for payment, timely submitted reimbursement requests no later than ten (10) workdays after the close of reimbursement period.

The ORO Wellness Committee will establish procedures to allow participation by all DOE/ORO employees in the review and update process.

6. REFERENCES.

- a. Comptroller General - Decision B-240371, January 18, 1991, "Defense Medical System Support Center - Health and Fitness Program."
- b. 5 U.S.C., Section 7901.

7. DEFINITIONS. None.

8. CONTRACTOR REQUIREMENTS DOCUMENT. None.

9. ATTACHMENTS.

- a. Attachment 1 - ORO Employee Fitness Plan, Rev. 1, April 2000.
- b. Attachment 2 - Private Vendor Approval Criteria.
- c. Attachment 3 - Application for Participation form.
- d. Attachment 4 - Reimbursement Voucher form.
- e. Attachment 5 - Attendance form.
- f. Attachment 6 - Termination of Participation in the ORO Fitness Program.

**THE OAK RIDGE OPERATIONS OFFICE
EMPLOYEE FITNESS PLAN**

Rev. 1, April 2000

This revision contains only administrative and editorial changes to facilitate incorporation of this Plan into the ORO Order for the ORO Employee Fitness Program.

INTRODUCTION

The Oak Ridge Operations Office (ORO) has basic medical and counseling services for its employees. However, a third component is required--physical fitness capabilities. With overall reduction in staffing within the Department, existing employees will be required to shoulder a greater workload which can be expected to contribute to increased levels of stress. A well-crafted exercise program will help to offset the deleterious effects of that stress. It has been documented that physical wellness programs also promote good mental health. Federal statute (Title 5, U.S.C. 7901) authorizes agencies to establish health programs to promote and maintain physical and mental fitness of Federal employees. Benefits derived from such programs can include: increased employee morale (management cares about employees' well being), increased productivity (mental fitness), decreased medical costs (reduced sick leave and insurance claims), and the benefit can be used as a recruitment tool (new workers look for benefits they can use now). The ORO Manager has approved the addition of a fitness component to the overall wellness program of the office.

BACKGROUND.

In accordance with guidance provided by the U. S. Office of Personnel Management, individual agencies are responsible for the following:

- ! Establishing a statement of goals and objectives,
- ! Providing management support for employee health programs,
- ! Determining the extent of services to be provided and the method(s) for providing them,
- ! Ensuring that programs are safe, appropriate, and meet legal and ethical requirements,
- ! Selecting qualified personnel,
- ! Publicizing the availability of health services through internal newsletters, posters, etc.,
- ! Planning for and coordinating the design of new (and the modification and/or expansion of existing) health/fitness facilities in Government-owned and leased space with appropriate GSA regional offices,
- ! Encouraging the use of available employee health services by making these services convenient and available to all employees,
- ! Developing an on-going evaluation process,
- ! Negotiating or consulting with unions, as appropriate, on the provision of health services for bargaining unit employees, and
- ! Reducing the risk of liability associated with employee health programs.

DOE Order 3790.1B and 5 USC Section 7901 (1998) provide relevant guidance. Some agencies have chosen to build and equip on-site fitness centers at the work place. Others have chosen to allow employees to become members of commercial health club/fitness centers. However, at DOE's field offices it would be difficult to find one center, or one chain of centers that would be convenient for a majority of potential users. The ORO has authority over sites located in five different states.

Several DOE offices, including the Ohio Field Office and others, have elected to provide a set stipend for employee fitness. These programs established a set amount as the Government's share of an individual's fitness program. When an employee presents a receipt for annual membership from an accredited health club/fitness center, that employee receives a treasury payment for the Government's share of that program. Under this scenario, each employee may choose a center that best fits his/her needs in the areas of location, types of equipment and programs, and hours of operation. The requirements for reimbursement are proof of payment in terms of a receipt and proof of usage of the health club/fitness center in terms of a log documenting usage will be submitted along with a reimbursement voucher. This type of program has been determined as the least costly and most fair for the ORO and its employees.

CONCLUSION

Based on the foregoing information, ORO has determined that the most flexible and beneficial plan is to allow each employee to select his/her own fitness facility and provide reimbursement of membership cost not to exceed \$200.00 per year.

The amount of \$200.00 contributes substantially toward an Employee Fitness Program while requiring some financial commitment by the individual. Random checks of local health clubs/fitness centers showed that membership costs range from \$360.00 to \$681.00 annually. One consideration to be emphasized is reimbursement funds provided to ORO employees for the fitness program are considered as income and therefore taxable. This is an IRS ruling employees need to be made aware of when signing up for corporate memberships under an employee recreation association.

Individual membership expenditures are the decision of the employee, whether only a basic program, a highly specialized program, or a facility with options for specific personal goals. Employees may acquire family memberships for an added discount and still receive reimbursement at the set government rate for the individual employee.

Based on this scenario, the health club/fitness center agreement is with individual employees. The ORO Wellness Committee will review submitted vouchers at the end of a six-month usage period. Upon verification of satisfactory proof of usage, the ORO Wellness Committee will submit a report to the proper ORO office, and the Government will then reimburse the employee for half the total annual stipend.

DOE- ORO is responsible for ensuring that the fitness program meets appropriate legal, safety, and ethical requirements (as indicated in the background section above). The ORO Wellness Committee, when established, will finalize the approval criteria. Using the finalized criteria, the Committee will publish a list of approved fitness centers. Subsequent additions of facilities to the approved list will be on a case by case basis. In order to qualify for the fitness allowance, an Oak Ridge Order (ORO O) will require that the individual employee show that he or she has used the membership a minimum of 26 times during a prescribed, semiannual usage period. Official travel and illness are considered extenuating circumstances and may affect the annual minimum usage.

It is anticipated that this ORO Fitness Plan will provide maximum flexibility to our employees as to where and when they are able to achieve the optimum health benefits of physical exercise, and afford them control over their individual fitness goals.

PRIVATE VENDOR (HEALTH CLUBS/FITNESS CENTER) APPROVAL CRITERIA

<u>Criteria</u>	<u>Rationale</u>
1. Equal opportunity club.	Federal law.
2. Possession of local/state health club certificates.	Local/State requirements.
3. Availability of staff to provide instruction on the safe and proper use of equipment and facilities.	Health and safety.
4. Sufficient resources to carry out a fitness program that allows the employee to conduct a minimum of 1-2 one hour fitness sessions per week (to average at least 26 sessions per usage period). It is suggested that twenty-minutes of these program periods should consist of continuous aerobic exercise (walking, jogging, stationary bike, etc.).	Health experts agree that a minimum of 2-3 hour exercise workouts a week are optimum to maintain normal physical fitness levels. Many ORO employees walk, jog, run or exercise during their lunch. ORO recognizes that official travel, and/or illness or other circumstances may prevent an employee from adhering to such a stringent schedule at the primary fitness facility.
5. Availability at least 5 days a week.	Facilities that are not open at least 5 days a week (except holidays) severely restrict capability of employees to tailor a fitness program that best fits their available time.
6. Lockers, locker rooms, and showers (recommended).	Privacy.
7. Free use of affiliated/associated clubs at other national locations (recommended).	Provides employees with options for use of facilities in the vicinity of assigned travel or training locations.
8. Certified professional fitness personnel capable of performing employee fitness assessments and designing fitness regimen (recommended).	A professional can tailor a program to the employee's specific needs and fitness level.

REIMBURSEMENT VOUCHER FOR EMPLOYEE FITNESS PROGRAM
U.S. Department of Energy, Oak Ridge Operations Office

Employee Name _____

Mailing Address _____

Routing Symbol: _____ - _____

Health Club/Fitness Center Name _____

Reimbursement period: Beginning _____ and ending _____.

Total amount of membership fee for reimbursement period: _____

Amount of membership fee to be reimbursed _____ (not to exceed \$100 for six month usage period).

I intend to continue fitness program: Yes _____ No _____

Reimbursement is contingent on the employee proving through adequate documentation that (1) he or she was a member at the named health club/fitness center during the 6-month period for which he or she seeks reimbursement, (2) he or she has paid the amount of membership fee listed above for the time period stated, and (3) he or she has used the club/center facilities approximately 26 times.

I certify that the expenses claimed herein are correct and proper. I understand that any reimbursement is considered a taxable fringe benefit and that I am responsible for payment of any taxes. I understand and agree that reimbursement of any membership fees for any future period is contingent on utilization of the health club/fitness center facilities approximately 26 times per 6-month period (once a week).

Employee Signature

Date

I certify that the expenses claimed comply with the ORO Employee Fitness Program policies and procedures.

ORO Wellness Committee Chair Signature

Date

ATTENDANCE FORM (SEMI-ANNUAL)									
NAME OF EMPLOYEE:									
NAME OF FACILITY:									
Date	Initials	Date	Initials	Date	Initials	Date	Initials	Date	Initials

Facility Representative: _____

TERMINATION OF PARTICIPATION IN THE ORO FITNESS PROGRAM

The following criteria apply:

Termination of Employment

Participation in the Employee Fitness Program will cease upon termination of employment. The employee must notify the ORO Wellness Committee that he/she is terminating participation in the program. Any further arrangements with the health club/fitness center are the employee's option.

Moving or Transferring out of the Area

If an employee is moving or transferring out of the area, it is his/her responsibility to notify the applicable health club/fitness center and the ORO Wellness Committee. If an employee transfers to another ORO site in a different state, he/she will be allowed to continue to aggregate his/her usage time if he/she elects to continue participation in the ORO Employee Fitness Program. An employee transferring from ORO forfeits his/her participation and any reimbursement for the usage period in which the transfer occurs.

Special and/or Unusual Circumstances

Employees wishing to drop out of the Program may request termination in writing to the ORO Wellness Committee.