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## Delivering Programs at Worksites: Lessons Learned by Extension Educators

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## Delivering Programs at Worksites: Lessons Learned by Extension Educators

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**Abstract:** *Worksite education has expanded to include informal education about self-help/family topics. Extension educators need information about how to access employee audiences and deliver programs in work settings. In a survey of NC Cooperative Extension Family and Consumer Sciences agents, 54 shared experiences and strategies for gaining the interest of employers, preparing for contingencies, and handling sensitive topics. Recommendations include identifying a key contact, previewing curricula with decision-makers, planning for variable audience size, and creating a climate of confidentiality and support. Taken collectively, these recommendations will assist Extension educators develop advance plans for worksite programming.*

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### Introduction

The workplace has long been the primary location for training employees in work skills. In recent years, as the line has blurred between work and family roles, the workplace has also become a setting for informal education about self-help and family topics. Employers recognize that helping employees address personal/family problems can improve their productivity at work (Gainey & Klass, 2005). Worksites may therefore be a prime context for Extension professionals seeking new audiences, especially in Family and Consumer Sciences. This article describes a study to gather information and wisdom from experienced North Carolina Extension Family and Consumer Sciences educators to assist others in the delivery of workplace programs.

### Problem Statement/Review of the Literature

Many employers recognize the value of providing informal learning opportunities onsite through their Human Resources departments, Employee Assistance Programs, lunch 'n learns, or online workshops, using in-house instructors or, increasingly, professionals external to the company (Gainey & Klass, 2005). The literature contains much evidence that such

programs improve health and well-being, morale, and loyalty, often resulting in increased productivity and profits (Rapoport, Bailyn, Fletcher, & Pruitt, 2001). Educational offerings are seen as benefits supporting a "family-friendly culture" or "work/life harmony" (McMillan, Morris, & Atchley, 2010) and are criteria used in rankings of "best places to work," for example, <http://www.bestplacestowork.org/BPTW/rankings/>

Although much has been written about worksite education in the field of human resources (Rainbird, 2000), we could find little that addresses the challenges external educators encounter in gaining access and conducting short-term workshops in the workplace. Searches of the *Journal of Extension* and *The Forum for Family and Consumer Issues* and additional Internet and library databases yielded a small set of articles about Extension involvement in workplace programs, primarily on wellness topics (Hongu, Block, Sanchez, Day, & Harris, 2010; Greenwald & Edwards, 2010). Unfortunately, these reports say little about accessing employee audiences, relationship building with employers, or program customization for varied work settings and topics. To address this gap, we designed a statewide survey to learn the extent to which North Carolina's Family and Consumer Sciences (FCS) agents participate in worksite instruction, details about their experiences, lessons learned, and tips about teaching employees at work.

## Study Objectives and Design

Study objectives were to determine (1) characteristics of worksite programs delivered; (2) methods used to get permission to conduct workshops, recruit participants, present sessions and evaluate programs; (3) challenges faced in doing worksite programs; and (4) practical advice for delivering successful workplace programs, including programs on sensitive family issues such as caregiving. The survey had 20 questions, with 13 closed-ended items and seven open-ended items. The instrument was approved by the NC State University Institutional Review Board.

Potential subjects included all FCS agents (N=117) employed by NC Cooperative Extension at the time of the survey and all were sampled. An invitational email was sent via the listserv to complete an anonymous online survey about their experiences conducting educational programs for employees in workplaces. Respondents were asked to consider their "experiences conducting educational programs (on any subject matter) for employees in work settings." The survey was posted for one month during which the population received four reminder messages.

## Results/Discussion

Fifty-nine (59) FCS agents responded to the survey. Five respondents without worksite training experience were removed from the database, leaving an N of 54. The quantitative results are reported as the percentages of respondents answering a particular question. The qualitative data are reported as themes and are headings in this article. Eighteen quotes from 12 respondents have been inserted to punctuate or add to the discussion of thematic content.

Workshops offered by individual agents ranged in number from 1-5 (22% of respondents) to "more than 15" (48%). Given a list and asked to check all that apply, respondents reported delivering programs at:

- Government agencies (80% of respondents)
- Educational institutions (65%)

- Manufacturing plants (56%)
- Health care facilities (50%)
- Non-profits (37%)
- Service industries (24%)
- Retail establishments (6%).

Unique mentions were a utility company, fitness center, senior center, department of social services, county employee wellness session, motorsports industry, and an insurance company.

Most respondents (87%) reported conducting multiple session programs or an equal mix of multiple- and single-session programs. Three-quarters of the respondents reported that the average size of their worksite classes was 11-20 employees. Most respondents (87%) reported that their classes averaged 31-60 minutes. Using a checklist of FCS program areas and asked to check all that apply, respondents reported workplace programming topics of:

- Health (85%),
- Foods and Nutrition (77%),
- Family Resource Management (50%),
- Human Development (37%),
- Housing (20%).

### **Access and Recruitment: Challenges and Strategies**

One of the study's main objectives was to discern how agents became involved in worksite programming and the challenges and successful strategies they used to gain access to employees. Most (83%) reported that some or most programs were employer-initiated.

In choosing any or all of six challenges they faced in gaining permission to conduct programs, 76% percent agreed that "scheduling educational programming during work hours is difficult." Fewer reported:

- Appropriate contact person was hard to identify/reach (30%)
- Employer required complete review of program materials before granting permission (16%)
- Employer did not see a need among employees for specific program (11%)
- No challenges (19%).

Respondents were asked "How important is knowing someone in the company for gaining permission to do worksite programs?" The answers ranged from crucial (56%) to not necessary (16%).

Asked to list strategies effective in gaining permission to deliver programs

at worksites, 39 provided longer responses. Two major themes emerged: starting at the management level and tailoring programs to the organization.

### **Starting with Management**

The majority of respondents (51%) said it was important to identify, communicate with, and meet with a key contact in the company to gain permission to offer programs. Effective strategies included talking with an upper manager or administrator to explain the program because "there needs to be a point person with the authority to make it happen." One focus of this early meeting is to communicate the benefits the program will bring to both the company and its employees in order to get buy-in from management. Educators need to listen for any concerns that the training will disrupt daily operations and should address these concerns as early as possible.

Reaching upper-level decision-makers can take some time. This is reflected in the advice to "Start planning long before you want to offer the class—it takes a while to get the wheels in motion." Perseverance was emphasized: follow up with the decision maker "like a dog with a bone, not letting it slip with the other duties" and if rebuffed "try again and again year after year."

Agents recommended that educators "be extremely organized" and "have all program materials in a packet for review at the initial meeting." The initial meeting is also the time to discuss what would help you succeed with the program, including internal marketing and audience incentives for attending. Once permission to deliver the program is obtained, expect to work with other company contacts for program implementation.

In some cases, agents recommended alternative routes to access by working through individuals in gate-keeping positions. Strategies included "starting with the switchboard operator or administrative secretary to determine the name of the appropriate contact person," or "talking directly with admin person or designated committee." Another suggestion was to go through someone you might already know to connect you to a contact person. Agents are typically integrated within their community, and some were able to increase company interest and employee interest by promoting the program at health fairs and church events.

### **Tailoring Programs to the Organization**

Regardless of the point of entry, communicating the value of the program for the company and its employees—and tailoring it to the company's workforce cannot be over-emphasized. In an era when so much is done electronically, the advice was to meet in person: "Show curriculum materials to be used. Give contact person(s) documents that lists goals/objectives of program." Sharing the training materials helps to secure the collaboration, because the contact will better understand the nature and purpose of the program.

Entering a worksite means being mindful of the employer's primary business purpose. Each employer's environment is likely to have different priorities and tempos. Our agents offered programs in diverse institutions. These experiences led them to stress flexibility, such as being willing to adapt to the company's schedule, keep within time constraints, and repeat programs for different shifts. Agents noted also that it may be useful to think of the relationship with an employer as building over a long period of time, beginning with a small successful program and then being invited back to add other programs.

## **Recruiting Participants and Conducting Program Sessions: Challenges and Strategies**

When asked to check the methods they had used to get employees to attend programs, the most frequent choice was that they provided publicity materials to the employer to distribute (79%); 73% posted flyers onsite themselves. Other popular methods were advertising outside of the workplace and visiting the workplace to announce the program or providing copy for a company newsletter.

Programs were delivered in a variety of spaces:

- Conference rooms (85%)
- Company classrooms (70%)
- Break rooms (44%).

Programs were also delivered in cafeterias, on factory floors, and at offsite facilities.

Employer-provided amenities included:

- Having management staff introduce the educator (78%),
- Day-of-event assistance (e.g., set-up, distributing or copying materials) (51%)
- Computer with LCD (43%).

Less common were employer-provided technical staff, VCRs, DVD players, flip charts, and markers. Unique employer contributions were food, advertising and registration, an intercom reminder announcement, Spanish translation, and travel expenses. Respondents used their own evaluation tool (91%) or an employer's evaluation form or did not conduct evaluations.

Asked to describe things that had gone wrong or not as planned in a worksite program, the 29 respondents wrote primarily about two challenges: unpredictable attendance and inadequate facilities.

### **Achieving Attendance Goals**

Several agents reported that program attendance was low due to inadequate internal publicity, schedule changes, or work emergencies. A few others reported situations where the audience turned out to be too large for the accommodations. Respondents suggested that educators should inquire about factors that might make for varying attendance and discuss their need to be informed of known schedule conflicts such as mandatory trainings and other special events so that Extension classes would not be scheduled in a competing time slot.

To avoid low attendance, educators may need to persuade employers to build in incentives for workers, in some cases even providing workers paid time to attend classes with high impact:

...sometimes you have to give people incentives just to come. I find that if the company makes the program "mandatory" then of course that helps. Or if the company ties attendance to a "prize" such as extra time off, that helps greatly.

Additionally, it may be good to "require more participants than your minimum so that when a few drop out you will still have a good-sized class." Several of our educators wanted to remind others that delivering good programs (practical, engaging, fun) and building a good reputation will help garner good attendance for future programs.

### **Contingency Planning for Space and Equipment Issues**

Although educators face possible space challenges in any community program, some of the challenges of delivering programs in work settings may be unexpected or unique. Respondents provided an array of stories about inadequate facilities such as noise and distraction from sharing a break room with people engaged in other activities or presenting on a factory floor or cafeteria, no space for set-up for food prep, poor lighting and seating, and technology problems or equipment failures. Respondents cautioned that educators need to anticipate these possibilities, discussing contingencies with their contact from the beginning of the planning process to the day of the event to have back-up plans and equipment that will work in the specific setting.

### **Addressing Caregiving and Other Sensitive Subjects**

An additional objective of our study was to determine how educators approached the planning and delivery of programs on sensitive topics in the workplace. Caregiving and other family issues can be emotional, personal, and touchy subjects to discuss with co-workers and supervisors. Employers might be reluctant to offer such programs, and employees might feel too vulnerable to attend. They may feel their job could be at risk if they expose information that causes concern about their work performance because of the competing demands of family.

We asked respondents to "advise a colleague" planning a program on caregiving about (1) whom to contact and (2) how to interest employers and employees. The 22 respondents who had delivered caregiving programs recommended many of the same strategies for access, recruitment, achieving attendance goals, and contingency planning as for other workplace programs. However, some felt different approaches might be warranted for programming on work/family issues. On access issues, for example, some said that because caregiving is a wellness, mental health or a safety issue, a preferable contact person might be a "the plant nurse, human resource director, risk management director, or the health and safety coordinator."

Several advised giving to management research-based information on employee challenges as well as "the business case" for addressing caregiver issues. One respondent suggested the following: "Explain how the education will help employees to be more productive at work, more adequately care for family members which may require less time away from work and/or worry about loved one, which distracts from work focus." Also suggested was to find an employee who was a caregiver to "validate the issues and how a worksite program might be structured, how it could be worthwhile for the employer. Invite that person to such a meeting."

Regarding attendance, some cautioned that there could be resistance by employers or employees to attending a caregiving workshop because it addressed mental health issues. One respondent said "Mental health issues are easier to sell if you present it in a context of lowering stress...Come at it from a safety angle." Another suggested that having a nurse attend would add legitimacy to the importance of self-care. One respondent suggested the personnel manager could identify employees needing this program and make contact with them individually to let them know about

the program. Achieving attendance for a caregiver program also requires compelling advertising: "Program flyers need to be attractive, eye-catching and offer real help...not just 'take care of yourself.' Give me some resources and knowledge with which to ease my situation or the people to contact to help me with my situation."

Respondents mentioned having employees set ground rules and commit to confidentiality. Some recommended that the educator minimize group discussion of highly personal issues by offering private discussions before or after the session. Another suggestion was for workers to choose a buddy from the class or a personal friend to contact for help if needed. Several agents suggested bringing information about community resources and following up with handwritten notes and Extension publications, agency brochures, or other relevant materials. Some respondents felt that special arrangements should be made to ensure the comfort of the audience, including requesting that supervisors not attend or holding classes offsite after work hours so issues could be more fully discussed, or referring employees to community-based programs where they are less likely to be among co-workers.

Most respondents, however, saw fewer problems and more potential benefits in doing worksite programs. One said: "It has been my experience that individuals do not share personal information unless they feel comfortable with the group they are with." Another said "Support is given by other participants and it is rewarding to see friendships develop" and "It is good for supervisors to see what family issues are present at home." Additionally, some suggested working closely with the human resource professional at all stages so "additional needs can be addressed and how we might work together to meet those needs." One respondent asserted:

The employees benefit so much more when they feel like their employer cares about their personal life as well as their professional life. The employer's attitude and actions determine the success of any workplace education in my opinion. I am more motivated as an educator and the employees are more motivated to make changes when there is support from the employer.

## Conclusions

The findings of the study reported here provide several strategies for planning and delivering educational programs at worksites under a variety of conditions and contingencies. Many of the solutions can be relevant in other community settings and with other audiences. Nevertheless, the Extension educators recognized that conducting educational programs in a workplace setting requires entering and navigating through a formal institution with a hierarchical structure, complex business priorities, schedules and rules, and embedded values daunting to a newcomer. Taken collectively, their responses reveal a road map of potential avenues to success as well as obstacles and alternate routes.

In summary, recurring themes and recommendations of our experienced FCS agents include the following.

- Recognize the differences between a business environment and other kinds of settings when planning your program.
- Make contacts with someone at the management level to 'buy-in' and authorize your program
- Follow up with a key contact who will work with you from the initial

planning through implementation and follow-up. Maintaining regular communication is critical for success.

- Develop and maintain good relationships with management and your key contact. This relationship building will not only increase the chances of having a successful program, but will also position you for being invited back for other programs.
- Share detailed information about your program so that your contact can help you find your audience, market your program, select proper facilities, and provide appropriate scheduling and amenities as available. Fully discuss the scheduling and accommodations of the company so that you can plan for contingencies.
- Understand the work of the organization and the staff who may constitute your audience so that you can tailor the curriculum and delivery methods to make the program practical, relevant, engaging, and fun.
- Carefully consider how to market a program with sensitive content and present the research and the business case for such a program. Discuss in advance the best ways to structure, staff, and locate the sessions to yield positive results for both the employees and the employer.
- Make plans for follow-up contacts with the audience and the organization.

Extension educators can meet educational needs of people who might not be able to get this information at other times or through other means. Organizing these programs requires: communicating the value of Extension programs to employers, becoming adept at identifying internal resources within the business, designing and executing detailed plans, following through at each turn, and being flexible to respond to multiple contingencies. Further research with a larger sample of Extension educators conducting worksite education is needed in order to determine how representative the experiences and insights of this group of educators are and which of the various strategies have broad applicability.

Some of the recommendations echo points made in recent studies about the need to find onsite "champions" to promote programs internally (Case, 2010) and the need to share leadership, including providing tools for worksite leaders (Maley, 2010). More information could be captured on the demographics of who attends particular kinds of workshops, as suggested in Case (2010), and more systematic evaluation research is needed to document best practices for diverse worksites.

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