

**CONTROL FORM FOR DOE/ORO DIRECTIVE**

**PART A (To be completed by the ORO DIRECTIVES MANAGEMENT GROUP, AD-440):**

**1. DIRECTIVE NUMBER, TITLE, AND DATE:**

**ORO O 340, CHAPTER V, CHANGE 5, EMPLOYEE FITNESS PROGRAM, dated 08/16/2007**

**2. PURPOSE OF TRANSMITTAL:** \_\_\_ New Directive     Revised Directive    \_\_\_ Revised Control Form

**3. DOES THIS DIRECTIVE CANCEL OR EXTEND ANY OTHER DIRECTIVES?**  Yes    \_\_\_ No  
**If "Yes,"** list what action (cancel or extend) and list the Directive(s) number(s), title(s), and date(s):

This Directive cancels and replaces ORO O 340, Chapter V, Change 4, EMPLOYEE FITNESS PROGRAM, dated 05/10/2007.

The attached Directive is forwarded for review and action. Complete Part B and forward a completed hard copy of this form to ORO DMG, AD-440, by **08/30/2007**.

**PART B (To be completed by the DIVISION OF PRIMARY INTEREST [DPI]):**

**COMPLETE FOR DOE DIRECTIVES ONLY:**

**4. SUPPLEMENTAL ORO DIRECTIVE REQUIRED?**

Is a new or revised supplemental ORO Directive required? \_\_\_ Yes    \_\_\_ No

**If "Yes,"** target date for submission of supplemental ORO Directive is \_\_\_\_\_.

**COMPLETE FOR BOTH DOE AND ORO DIRECTIVES:**

**5. CONTRACTOR APPLICABILITY.**

**Does this Directive affect the work performed by ORO Contractors?** \_\_\_ Yes     No

**If "Yes," whom?** \_\_\_ Bechtel Jacobs Company LLC    \_\_\_ ORAU

\_\_\_ UT-Battelle, LLC    \_\_\_ ISOTEK (Bldg. 3019, ORNL)

\_\_\_ Foster Wheeler (FWENC)

\_\_\_ Other Contractors (list by name)

**6. SUBJECT MATTER EXPERT:** Richard Martin    Environmental and Quality Mgmt. Div., SE-32  
Name    Organization

*Original Signed By*

**7. APPROVED BY:** Richard Martin    Environmental and Quality Mgmt. Div., SE-32    08/20/2007  
Signature    Organization    Date

**PART C (To be completed by the ORO DIRECTIVES MANAGEMENT GROUP, AD-440):**

**APPROVED FOR DISTRIBUTION IN ACCORDANCE WITH OFFICIAL DIRECTIVE DISTRIBUTION LIST:**

*Original Signed By*

Wayne H. Albaugh

08/27/2007

DMG Team Leader, AD-440

Date

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

(Revised 02/10/2006)

# U.S. Department of Energy

Oak Ridge Office

ORO O 340 Chapter V Change 5
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DATE: 08/16/2007

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**SUBJECT: EMPLOYEE FITNESS PROGRAM**

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1. PURPOSE. This Chapter correlates to DOE O 341.1, FEDERAL EMPLOYEE HEALTH SERVICES, dated December 1, 2003, by assigning responsibility and accountability and providing administrative guidance to Oak Ridge Office (ORO) Wellness Program. Nothing in this issuance changes any requirements contained in any Department of Energy (DOE) Directive.
2. CANCELLATION: This Chapter cancels and replaces ORO O 340, Chapter V, Change 4, EMPLOYEE FITNESS PROGRAM, dated May 10, 2007.
3. APPLICABILITY. The provisions of this Chapter apply to all DOE-ORO employees, including those located in Oak Ridge and outlying localities. Employees of the DOE Office of Inspector General's Office in Oak Ridge and the Thomas Jefferson Site Office in Newport News, VA., are eligible to participate in the program.
4. RESPONSIBILITIES.
  - a. Manager, ORO.
    - (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, ORO.
    - (1) Ensures that adequate funds are provided in the annual budget submission for the Employee Fitness Program.
    - (2) Reimburses employees semiannually based on approvals supplied by the 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, ORO 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 (facility) approval status (see Attachment 2) and provides assistance, information, and/or guidance to employees concerning local health clubs/fitness centers.
  - (3) Reviews, approves, and submits requests to Oak Ridge Financial Service Center (ORFSC) for payment.
- 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 was November 15, 1999.
- b. ORO Wellness Committee Responsibilities.
  - (1) Review submitted reimbursement requests (vouchers) after each six-month usage period. Upon verification that reimbursement criteria have been met, submit a request to the ORFSC for payment.
  - (2) Establish guidelines for approval of facilities and for qualifying usage. Usage shall be an average of at least once per week, but may include exceptions for travel and illness as determined by the Committee.
  - (3) Establish requirements for submittal of vouchers.
- c. Employee Responsibilities.
  - (1) Each ORO employee is eligible for the fitness program and is responsible for obtaining his/her own membership in an approved facility. Applications for participation will be accepted at anytime throughout the year. 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. The initial voucher must be submitted after completion of a full usage period, and should include request for reimbursement for the partial period. 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) Reimbursement is contingent on evidence that the employee met usage requirements established by the Committee (an average of at least once a week with possible exceptions for travel and illness). See Attachment 5 for an example Attendance Form which may be used if the facility does not provide the employee with usage information.
- (4) Vouchers shall include evidence of payment to the facility and of qualifying usage. Information received from the facility regarding payment and usage may be used as such evidence.
- (5) Vouchers shall be submitted in accordance with requirements established by the Committee. Vouchers submitted on paper must be submitted within 5 working days following the end of the usage period. Electronic submittals must be entered prior to the end of the next six-month usage period. Electronic submittals entered after the next six-month usage period will not be paid.
- (6) 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.
- (7) 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.
- (8) An employee terminating employment forfeits his/her participation and any reimbursement for the usage period in which the termination occurs.

6. REFERENCES.

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

7. DEFINITIONS. None.

8. CONTRACTOR REQUIREMENTS DOCUMENT. None.
9. ATTACHMENTS.
  - a. Attachment 1 - The Oak Ridge Office Employee Fitness Plan, Revision 1, April 2000.
  - b. Attachment 2 - Private Vendor (Health Clubs/Fitness Center) Approval Criteria.
  - c. Attachment 3 - Application for Participation, Oak Ridge Office Employee Fitness Program, form.
  - d. Attachment 4 - Reimbursement Voucher for Employee Fitness Program, U.S. Department of Energy, Oak Ridge Office, form.
  - e. Attachment 5 - Attendance Form (Semi-Annual).

**THE OAK RIDGE OFFICE EMPLOYEE FITNESS PLAN**  
Revision 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 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 O 341.1 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 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 Representative Signature

\_\_\_\_\_  
Date

