



UNITED STATES
DEPARTMENT OF THE INTERIOR
GEOLOGICAL SURVEY
PHYSICAL FITNESS PROGRAM
HANDBOOK

January 2002

TABLE OF CONTENTS

Section

1. **Background and Authorities**
 2. **Guidelines**
 3. **Goals**
 4. **Objectives**
 5. **Funding**
 6. **Ad Hoc Fitness Work Group**
 7. **Authorized Fitness Program Components**
 8. **Facility Requirements and Exclusions**
 9. **Employee Eligibility**
 10. **Cost Comparison Procedures**
 11. **Selection of Program Components**
 12. **Local Guidance**
 13. **Reimbursement Procedures**
 14. **Security and Safety Issues**
 15. **Time and Attendance Issues**
 16. **Labor Relations Obligations**
- Attachment 1: Sample Employee Survey**
- Attachment 2: Waiver and Consent Form**
- Attachment 3: Report of Taxable Income**
- Attachment 4: Frequently Asked Questions (FAQs)**

1. BACKGROUND AND AUTHORITIES

The importance of maintaining a healthy and fit Federal work force was first recognized by the U.S. Congress in 1946 with the passage of Section 7901 of Title 5, United States Code, authorizing agencies to establish within the limits of appropriations available, health programs to promote and maintain the physical and mental fitness of Federal employees. Under this authority, agencies established health units to provide health services to employees such as physicals and health screenings. It was not until 1970 that health and fitness programs began to flourish.

By 1987, the Office of Personnel Management, the Office of Management and Budget and the General Services Administration had amended regulations to make it clear that agencies may, subject to budgetary constraints, expend appropriated funds to establish or support health and fitness programs for their employees. Current authorities allow agencies to pay the costs for employee membership in a private fitness facility and/or to establish fitness centers in Federal facilities. The USGS policy is based on the authority provided by 5 USC 7901, and CG decisions B218840 and B240371.

2. GUIDELINES

The USGS is committed to providing its employees with opportunities to achieve and maintain physical fitness to the fullest extent possible within budgetary constraints.

The USGS Physical Fitness Program is designed to provide interested employees access to fitness training while not dictating the form and source of that training. The USGS Physical Fitness Program includes several options for providing access to employees to include:

- A. Subsidizing a portion of the individual membership costs to fitness facilities or groups through employee reimbursement
- B. Providing on-site facilities such as showers/lockers
- C. Establishing fitness “centers” on-site to include the purchase of equipment and designation of space to be available to all employees
- D. Contracting with fitness facilities for group discounts
- E. Providing on-site health services and/or fitness classes, such as aerobics, yoga, and smoking cessation, and screenings for glaucoma, hearing, blood pressure, etc.

3. GOAL

The goal of the USGS Fitness Program is to establish a program that allows for local implementation and meets the needs of our employees, regardless of their geographic location. The USGS Fitness program is further intended to assist in minimizing the risks of premature morbidity, mortality, and disability, foster healthy lifestyles, and support a healthy work environment.

4. OBJECTIVES

To employ cost effective methods to meet the fitness needs of employees resulting in a program that:

- A. Delivers highly beneficial services to the greatest number of employees
- B. Creates an awareness among employees of the value of health consciousness and the benefit of exercise to individuals, their families and the organization
- C. Provides flexibility to accommodate the identified needs of the various office locations and promote maximum employee participation
- D. Demonstrates sound financial management practices and prudent expenditure of available funds by each USGS location
- E. Adds to the cadre of benefits available to USGS employees in order to recruit and retain the excellent human resources necessary to assure our scientific future

5. FUNDING

No additional funding will be made available for offerings under the provisions of this handbook. Cost Centers will be responsible for funding this program within existing appropriations. Funding is limited to 50% of individual membership fees for a commercial fitness facility, or a total of \$200.00 per employee per year, whichever is less. When preparing cost comparisons, to buy equipment or establish an on-site fitness center, overall costs may not exceed \$200.00 per employee likely to participate times the expected life of the center or equipment, e.g., 20 employees times \$200.00 times 10 years or \$40,000.

6. AD HOC FITNESS WORK GROUP

Each USGS location should, if feasible, establish an ad hoc team of one or more interested employees willing to serve on a fitness work group. This work group should consult with their servicing contracting officer at the beginning of the process to ensure that applicable procurement regulations are followed in the information gathering phase. Also, Contracting Officers may be asked to serve as

part of this work group. The local fitness work group will be responsible for the following activities, if applicable in the local area:

- A. Develop, issue, and compile the results of an employee needs survey (see sample at Attachment 1) to determine the needs and interests of employees (Note: It may be beneficial to amend the survey to include actual choices from among the locally available fitness centers. This may further assist the work group in deciding where to concentrate their efforts for group membership discounts.)
- B. Canvass local area commercial fitness providers (health clubs, YMCA, YWCA, local Parks and Recreation officials, etc.) to determine local availability and obtain an estimate of the local market costs of fitness-related services.
- C. Make recommendations to the local management official who has the approval authority to expend related funds as to what should be offered. In instances where more than one cost center is located in the same geographic location, e.g., the National Center, those cost centers must work together to establish the offering(s) that will achieve economies of scale and ensure equitable treatment of all employees at that location.
- D. Prepare an announcement of the fitness program offering for all employees at the location.
- E. Participate in review of the fitness program as needed.

7. **AUTHORIZED FITNESS PROGRAM COMPONENTS**

In order to meet the USGS Physical Fitness program goals, USGS locations may expend funds to provide for any or all of the following types of services:

- A. **Group Membership Discounts** could be established with one or more off-site commercial fitness facilities that will provide the desired services. USGS would pay an amount to be determined annually depending on the number of employees participating and funds available. As a result of the USGS payment, employees would be offered and would be solely responsible for paying a reduced monthly charge for membership.
- B. **Individual Memberships** may be supported instead of or in addition to group membership contracts as part of a local fitness program; however, employees may not receive a dual benefit. Employees may contract with an off site commercial fitness provider and be reimbursed for a portion of their membership fees. The employee would be responsible for all payments to the commercial facility and would file for reimbursement by providing necessary

documentation. If this option is included in the local fitness program offerings as well as the opportunity for a group membership discount, the rate of reimbursement, e.g., the percentage of the membership fee discounted/reimbursed should be the same for all employees. The percentage of reimbursement is applied to a single (the employee) membership and not a family rate. (Employees who have contracted with a commercial fitness provider for a family membership may be reimbursed under this policy. The employee is responsible for providing proof of the cost for an individual membership at the fitness provider. The percentage of reimbursement will then be based on the cost of an individual not family membership.) **Exercise Classes** offered by various commercial, public, and non-profit groups can also be considered for reimbursement of part of the monthly fees.

- C. **Establishing an On-site Fitness Center** should be considered as well if, after making a cost comparison, this option is more fiscally sound. When considering this option, the cost for equipment purchase and maintenance, space allocation and any renovations/modifications required, the cost for access for individuals with disabilities, potential need for staffing of the center, etc., must be included in estimates. (See “Cost Comparison Procedures”.)
- D. **On-site Health and Fitness Classes** may also be paid for with appropriated funds and may be offered in addition to or instead of other options as funds and availability of instructors dictate.

While not a part of this program, managers can provide health screenings and physicals to their employees. Your servicing procurement office can provide you with further information on contracting for these services.

8. **FACILITY REQUIREMENTS AND EXCLUSIONS**

Facilities considered for inclusion in local fitness program offerings should include basic features such as shower and locker room facilities, aerobic and strength training classes and/or equipment, and appropriate mechanisms or procedures to minimize the possibility of personal injury, e.g., guidelines posted for the proper use of machines, on-site training personnel for instruction on machine use, fitness testing, etc. Facilities should be compared based on their offering of basic program needs: health improvement and maintenance activities, instructional and educational servicing, and fitness testing. Additional services outside the basics may be included in actual membership, but should not serve as the basis of choosing one facility over another, especially in cases where additional costs will be incurred by the USGS as a result.

One-time fees for registration in competitive events or recreational activities such as golf, downhill skiing, horseback riding, swimming, and team sports such as volleyball, basketball, baseball or football are not included or covered under this policy. Classes in the above recreational activities may be covered in local policies if available.

Facilities that deny membership based on race, color, national origin, age, sexual orientation or sex may not be used. However, facilities that cater to one sex or the other may be considered as long as the local program offers the same benefit to all employees. For example, a “women’s” center may be included in the local offering, or be acceptable for employee reimbursement, so long as additional cost-sharing arrangements and facilities acceptable for reimbursement that include male employees are part of the program.

Efforts should be made to ensure facilities are available to individuals with disabilities such as contracting with a commercial fitness facility that provides sign language interpreters for the hearing impaired to attend exercise classes.

9. EMPLOYEE ELIGIBILITY

Participation in commercial fitness programs cost-shared with or employee-reimbursed by USGS is limited to permanent full- and part-time employees, and employees on time-limited appointments of one year or more. Participation in the USGS Fitness Program is strictly voluntary.

Family members of an employee, contractor personnel, individuals contracting directly with the USGS (e.g., consultants, students, etc.), and the general public are not eligible to participate in the fitness program or use on-site fitness facilities or equipment. Where there is on on-site fitness facility or equipment, exceptions to this rule may be considered for contractor personnel if: (1) the affected contract originally or as amended provides for use of the on-site fitness facilities or equipment by contractor personnel; and (2) the contract originally or as amended specifies that contractors and contractor personnel using the facility will indemnify and hold the government harmless for any and all injuries sustained by its personnel at the fitness facility or as a result of use of the equipment. Unit cost per contractor employee, payable to the government, shall be established by the contracting officer at the time the contract requirement is initiated. Note: This exception is not applicable if, in the sole discretion of the contracting officer, nongovernment fitness facilities and/or equipment are otherwise reasonably available within the general geographic area in question.

Employees who meet the eligibility requirements above must also submit a **Waiver and Informed Consent Statement** (Attachment 2) prior to participation. This statement must be renewed on an annual basis. The employee should receive a copy of the Waiver, and the original should be maintained on file in the office where approval for cost-sharing or employee reimbursement is exercised. Previous year Waivers should be maintained for a period of six years.

10. COST COMPARISON PROCEDURES

As a result of the employee survey, there may be justification to enter into a contract with a commercial provider and/or reimburse employees for personal fitness memberships rather than establish an on-site facility based on the benefits to be derived for the funds expended. For example, if the majority of employees interested in participation express a need to participate at times outside the normal hours of operation at the local cost center, establishment of an on-site center may not produce the greatest benefit to employees. If the majority of employees express the need to use a commercial facility near their home because of day care issues, car pool issues, etc., again, establishment of an on-site facility may not be of most benefit. While it may be cheaper in terms of actual funds expended to create an on-site center, if the center then goes virtually unused, the fitness program goals are not met.

If a contract is to be pursued with a commercial fitness provider, the servicing acquisition office should be contacted. The acquisition office will assign a contracting officer. The fitness work group will obtain the names, addresses and contacts of potential local area providers. The fitness work group should also gather publicly available membership and price information from fitness organizations, but should avoid having discussions of membership fees tailored to the USGS. The fitness work group will then develop a package for submission to the acquisition office to include: a short (one page) document stating its needs from the fitness provider based on the employee survey; one or two factors the work group feels are important in the selection of the provider (such as distance from the office, specific class offerings, etc.); the contact information outlined above for each potential provider; and a completed DI-1. The acquisition office, in consultation with the fitness work group designee, will solicit quotations from as many local area commercial fitness centers as possible, that include the services provided by each, and will compare those two factors and the cost of providing an on-site fitness center. Data from the Employee Survey should be used to determine the scope of comparisons. Only a warranted contracting officer may actually engage in contract negotiations for discounts with fitness facilities.

11. SELECTION OF PROGRAM COMPONENTS

The senior manager at each USGS location has the authority to select and approve the components of the local fitness program based on the recommendations of the fitness work group and in keeping with applicable procurement regulations. This authority may be delegated in writing with a copy to both the servicing personnel and procurement offices. Once the components are selected, the servicing procurement office will obtain any necessary contracts for group membership discounts. When contracts with fitness providers are completed, employees must be notified by the approving official of the availability of services and any necessary local procedures to obtain them.

12. LOCAL GUIDANCE

Local guidance should address the following issues:

- A. Enrollment procedures to include any enrollment deadlines
- B. Documentation requirements for reimbursement
- C. Program review timelines
- D. Program success indicators
- E. Where and to whom Waiver and Consent Forms are submitted
- F. The discounted fee for off-site fitness center(s)
- G. Contract requirements for specific off-site fitness center(s) such as a requirement to sign a one-year contract, if any
- H. The amount for reimbursement, if applicable
- I. Other information necessary for employees to understand their responsibilities and to make their choices within program guidelines, such as the name, mailing address and registration procedures of all fitness centers at which employees will be afforded a discount.

13. REIMBURSEMENT PROCEDURES

Cost Centers in locations that have elected to reimburse employees for part of their individual membership in a commercial fitness facility may reimburse employees quarterly. Employees must submit a completed Taxable Reimbursement Request form (see Attachment 3 of the Handbook), and receipt(s) of payment to the commercial fitness facility to the appropriate approving official. Any subsidy paid to the employee for membership or participation in a fitness,

wellness, or health facility, spa, gym, etc., is taxable income and must be reported on the employee's W-2. The completed form should be sent to the servicing Payroll Processing Group for processing of payment.

Once local guidance is established and published, the immediate supervisor may be delegated responsibility for approval of reimbursement.

14. SECURITY AND SAFETY ISSUES

Managers who establish on-site fitness facilities must ensure that the facility meets minimum safety standards such as sufficient exits, lighting, etc. In addition all equipment installed must be installed in accordance with manufacturer's guidelines and recommendations. Instructions on proper equipment use should be posted in plain sight of the equipment at all times.

Access to on-site facilities should be limited to the hours within which employees are allowed to report to/depart from work, e.g., currently from 6:00 a.m. to 7:30 p.m. at the National Center, unless further restricted due to local building security or safety requirements. Employees should refrain from using on-site facilities during hours when other employees are not present in the vicinity of the fitness facility to ensure help can be obtained in the case of accident or injury.

Use of on-site equipment will normally be on a "first come, first served" basis; however, local managers may establish scheduling procedures to minimize the amount of waiting time required.

Employees who use on-site facilities are covered under the Federal Employees' Compensation Act (workers' compensation). Claims of injury or illness will be handled on a case-by-case basis in accordance with appropriate laws, rules, and regulations.

15. TIME AND ATTENDANCE ISSUES

No official duty time may be approved for exercise. Employees may use local or commercial facilities during their lunch break in accordance with the policies governing their specific work schedule. Participation in a fitness program is a viable reason for approval of a flexible lunch period under flexitime or maxiflex when the time will be made up during the same workday. Employees may also seek advance approval to use accrued credit time, compensatory time off, or annual leave to participate in a fitness program. Supervisors are encouraged to cooperate with employees who wish to adjust their work schedule, to include their lunch period, in order to use fitness facilities.

16. LABOR RELATIONS OBLIGATIONS

Locations whose employees are represented by a labor organization must meet their obligations under the Federal Service Labor Management Relations Statute and any existing collective bargaining or other agreement obligations.

Notification to and bargaining with the employee's representative may be required prior to implementation of a local fitness program. Union representatives may be entitled to participate as a member of the fitness work group, to preview/have input into the contents of the employee survey, etc.

Consult any collective bargaining agreement and with the servicing personnel office to determine if an obligation exists and for assistance in the bargaining process.

8. Please number the activities in which you would be/are participating in order of interest with "1" being of the most interest to you.

_____ weight training _____ cycling _____ walking
_____ aerobic dance/exercise classes _____ swimming
_____ jogging _____ martial arts _____ kickboxing
_____ circuit training _____ other, please explain

9. What type of equipment do you prefer when you exercise?
(Indicate all preferences in order of importance with "1" being of most interest to you.)

_____ weight training machines (e.g., Nautilus equipment)
_____ treadmill _____ free weights _____ resistance bands
_____ Universal Gym _____ rowing machines
_____ stationary bike _____ life cycles
_____ other, please explain _____

10. Would you participate in a USGS-sponsored program that provided an individual health and fitness assessment? _____ yes _____ no

11. Please indicate your interest in any of the following classes or activities by an "X".

_____ aerobics _____ yoga _____ smoking cessation
_____ weight watchers other (write in) _____

WAIVER AND CONSENT FORM

I assume membership in the U.S. Geological Survey (USGS) physical fitness program at my own risk. I, for myself, my heirs, executors, and administrators, waive and release any and all claims and rights for damages I may have or hereafter may accrue against the USGS related to my participation. I agree to consult my physician prior to my participation.

I am voluntarily entering into a fitness program in an attempt to improve my physical fitness. I understand that physical fitness activities are designed to place a gradually increasing workload on my circulations and cardiovascular system and thereby attempt to improve its function. The reaction of the cardiovascular system to such activities cannot be predicted with complete accuracy. There is a risk of certain changes occurring during or following the exercise. These changes include abnormality of blood pressure or heart rate, ineffective heart function, and possibly, in some instances may result in a “heart attack” or “cardiac arrest”.

I realize and accept responsibility for the necessity to report promptly to a qualified medical doctor any signs or symptoms indicating any abnormality or distress.

I understand that I am solely responsible to ensure my physical ability to take part in physical exercise activities prior to participating in this program.

I understand that I am not covered under the Workers’ Compensation program for injuries or medical conditions that result from my participation in the USGS Fitness Program at a commercial fitness provider. My coverage while participating in an on-site facility, to include showers and locker room facilities, will be determined on a case-by-case basis in accordance appropriate laws, rules, and regulations.

I understand that in the case of a commercial fitness facility, the USGS has either paid a lump sum payment to reduce my payment to the facility, or will reimburse me for a portion of my membership fee. I further understand that all other fees due to the fitness facility are my responsibility, and I agree to pay those fees in a timely manner and in accordance with the requirements of the fitness facility contract.

I have read the above conditions and accept them by my signature below.

Employee: _____ Date: _____

Witness: _____ Date: _____

Original to approving official, copy to employee.

Taxable Reimbursement Request

MEMORANDUM

To: Payroll Operations Division
Attn: _____

From: _____
(Name of Timekeeper)

(Organizational Location)
Department of the Interior, U.S. Geological Survey

Subject: Report of Taxable Income
Fitness/Wellness Subsidy

Employee Name: _____

Social Security Number: _____

Period Covered: _____

Taxable Income to be Reported for Tax Year: _____

<u>Pay Code</u>	<u>Amount</u>	<u>Cost Account Number</u>
EFB	\$ _____	_____

Authorized By: _____

Date: _____

Telephone Number: _____

I certify that this claim is true and correct to the best of my knowledge and belief and that payment or credit has not been received by me. Receipts are attached.

Employee's signature and date

NOTE: Original to Payroll Operations Division. Copy with receipts maintained in originating office.

**USGS FITNESS PROGRAM
FREQUENTLY ASKED QUESTIONS (FAQs)**

Are all USGS locations required to provide a fitness program for employees?

All USGS locations are required to perform the research necessary to make a determination if funds are available, and if so, what is the most efficient expenditure of those funds in support of employee fitness. Cost centers must make a decision on fund availability on an annual basis.

If I already belong to a fitness center, can I just submit the paperwork to my supervisor and get reimbursed for all or part of my membership fee?

No, you must wait until a decision has been made on fund availability, and whether or not employee reimbursement will be part of the local program.

Do I have to participate in the employee survey on fitness?

No, but you should if you expect to participate in the resulting local fitness program. The employee survey results will be used to determine estimated participation rates. The estimate participation rate will then determine the most cost effective approach to providing employees with fitness opportunities.

Is the survey confidential?

Yes, it is not necessary to provide your name.

How often will employees be surveyed?

That will depend on a number of factors. If the location where you work experiences a low turnover rate, there have been no changes to the local fitness offerings, and no program problems have been identified, employees may not be surveyed with any regularity. If there is a higher turnover rate and changes to local offerings, such as the building of new fitness centers, then the employee survey should be conducted as needed to support changes in the local program. Some locations may choose to survey employees on an annual basis in order to make annual decisions about funding levels.

Does the local fitness program have to provide every activity for which an interest is expressed?

The USGS Fitness Program aims to provide maximum flexibility to allow employees every opportunity to participate in whatever type of activity they choose at the facility of their choice within budget and regulatory requirements. However, it is likely that some

of the expressed interests will fall outside the program guidance and capability. In addition, limited funds may limit what is offered at a particular location.

Will all the local fitness programs be the same?

Not necessarily. Each cost center must determine the funds available, the sources for fitness services available, and employee interest prior to determining the specifics of the local program. The USGS policy was designed to allow maximum flexibility at the local level.

Can a lump sum payment be made to a commercial facility to decrease employee costs?

Yes. The local procurement staff should negotiate the best deal for that location, and a payment covering up to a 12-month period is allowed.

Is there a limit to the number of facilities at which group rates can be negotiated?

No; however, the more employees who will use a particular facility, the greater the bargaining power and the greater the potential discount that can be made available.

Is a lump sum payment required to negotiate a group discount?

Not by the USGS policy or procurement regulations. This will depend on the specific commercial facility. Some facilities may extend a group discount if they are guaranteed a specific number of individual contracts. If this were the case, employees would have to commit to membership as part of the bargaining process.

Is there a deadline for signing up for the program?

This will depend on the needs and capabilities of each local cost center. All employees who wish to participate may be required to sign up by a specific time each year in order that the amount of reimbursement or discount can be determined, funds may be obligated, and any funds not used by that date can be redirected to other programs.

Will the fitness work group be involved in the negotiations with the facilities?

The assigned Contracting Officer will actually negotiate any contracts with the fitness facility, but the work group plays a key role in providing the Contracting Officer with all the available information it has collected, and informing the Contracting Officer of the desired results.

Except for individual membership agreements, no one other than an authorized member of the procurement office may make any commitment or agreement with any fitness facility.

Who approves the local program?

The senior management official at each USGS location is delegated approval under this USGS policy.

If an employee is injured or develops a medical condition as a result of participation; do Workers' Compensation benefits apply?

If the employee is injured or develops a medical condition as a result of participation at an off-site fitness facility, the employee is **not** covered by Workers' Compensation.

If the employee is injured or develops a medical condition as a result of participation at an on-site Federal facility, to include shower and locker room facilities, the employee's coverage under Workers' Compensation will be determined on a case-by-case basis in accordance with governing laws, rules, and regulations.

Should local managers review employee participation in the program?

Local managers should regularly review employee participation in terms of how many employees are participating in which aspects of the program offerings to make a determination that funding is being directed to obtain the greatest benefit to all employees and to terminate arrangements that do not have enough employee participation to warrant the continued expenditure of funds.

Managers and supervisors are not empowered to monitor individual progress of employees. Employees are responsible for ensuring that if they are taking advantage of the discounts and/or reimbursement for membership, they are doing so in an appropriate manner.

Who will be responsible for handling employee complaints about the fitness program?

Each USGS location should designate someone to be responsible for receiving and resolving employee complaints. If a complaint results from an individual membership that is reimbursed, the employee should speak to the appropriate individual at the fitness facility. If the complaint is with a facility with which the cost center has a contract, the employee should talk to the designated individual for the local program, who should also make sure that the Contracting Officer is informed of the complaint as well.