

## Step One: Capture Senior Level Support

The first step towards creating a “well workplace is to capture senior level support. This is critical to the success of any wellness initiative if you expect to secure the financial resources necessary to deliver effective programming, or have access to the organization to accomplish your objective(s). Moreover, senior executives can provide additional assistance by helping to associating health promotion objectives to business priorities. Securing support from management while challenging, is not an impossible task.

**Goal:** Transform your organization’s culture by integrating health promoting practices into the day-to-day operations

- Senior level executives can provide additional assistance towards correlating health promotion objectives to business outcomes – thus integrating health promotion as a fundamental part of the organization.
- Senior level executives can significantly increase the likelihood that your initiative will be effective by developing and implementing organizational policies that support and sustain a healthy workplace environment.

### Three questions you need to ask....

- 1) **What are the organization’s short-term and long-term strategic priorities?**
  - By knowing what needs to be accomplished organizationally, you will be able to better position your health promotion activities so that they fit within the context of the core business units and objectives.
- 2) **What benefits can be expected from your wellness initiative and what’s the potential value of health promotion to the organization?**
  - Conceptualize how the health promotion initiative can impact the organization in a meaningful manner.
- 3) **What are the leadership styles, pressures, strengths and weaknesses of your senior level executives?**
  - Developing an understanding of your management’s working style will help you gain the support you need. Employee wellness programs that are approved and funded with a commitment from the top have the most success.

## Step Two: Create a Cohesive Wellness Team

The creation of a healthier workplace requires more than one person; it requires a group of employees, working together toward the same goal. A cohesive wellness team allows for different ideas about health, costs, and productivity to emerge. By including key decision makers throughout the organization, the wellness team can ensure that is credible among all employees.

**Goal:** Create a wellness team that develops, guides, and oversees the organization's wellness efforts.

- A wellness team establishes a vision, decides on goals, and clearly identifies impactful interventions based on business priorities and data relevant to employee wellness status.
- The wellness team should be comprised of members who can think strategically, make realistic plans and recommendations to leadership, while anticipating potential risks.

**The following recommendations and guidelines can help you assemble your wellness team:**

- Identify if potential wellness team members should be appointed by leadership or be comprised of volunteers.
- The wellness team should include people from many different areas and levels throughout the organization.
- The wellness team should be comprised of individuals at all stages of the wellness continuum to reflect the diversity of health present at your organization.
- *Size:* There is currently no right or wrong answer. It is recommended that the wellness team be big enough to be representative of the organization as a whole, but small enough to be manageable.
  - For large companies, it's not uncommon to have wellness teams that range in size from 14-20.
  - In smaller companies, four to seven is common.
- The wellness team should meet regularly - monthly or bimonthly.
  - Meetings are typically more frequent in the initial stages of planning and development, decreasing to a lesser frequency as the intervention is implemented.
  - Agendas are established and distributed prior to the scheduled meeting.
  - Appoint a wellness committee member to take minutes and distribute meeting minutes.

### **Step Three: Collect Data to Drive Health Efforts**

Successful wellness programs collect data regularly. This data allows your wellness team to deliver interventions that are carefully researched, intricately designed, seamlessly implemented, and results oriented.

**Goal:** Fully assess the health and wellness of your organization identifying employee health concerns and interests while providing a baseline by which to measure change and move the proposed health and wellness program from activity centered to results oriented.

**Common sources of data are the following:**

- Employee Interest Survey
  - Health Assessment
  - Health Culture Audit
- 
- **Employee Interest Survey**

An individual interest survey will uncover both met and unmet health interests within your employee population. This questionnaire is often used to identify the types of activities that employees would like to see implemented as part of a potential wellness program.

This method of data collection ensures that employees are being offered programs and interventions that are of particular interest to them. This also aids the wellness team in creating their operating plan to deliver interventions per the employees' wishes.

Interest surveys make employees feel a part of the process as well as part of the overall programming process. Employees feel good when they are given the opportunity to make their opinions known.

- **Health Assessment**

A HA is an annual health questionnaire that employees complete in regards to their health habits and history. After completing the questionnaire, employees receive a personalized health report and action steps to better their health. The key to making the HA process work for both the employee and the employer is confidentiality. Employees should be assured and comfortable that the employer will have no access to any individual employee health data. In addition, the employees should also be informed that the company will receive an aggregate report of the overall findings, but this report does not and will not contain any individual health identifiers.

A HA summary report can provide year-by-year comparison of health risk trends in your organization and help the wellness team determine the health conditions and health challenges of employees; assisting them in creating their operating plan and deciding on appropriate interventions.

- **Health Culture Audit**

The second primary source of data should be collected is a company-wide health culture audit. The health culture audit is a tool that assesses the company's overall culture as it relates to health and productivity. A company's culture is a powerful influence on individual health status. A wellness culture features norms that make it easier for people to maintain healthy lifestyles. Ideally, the Health Culture Audit should be conducted each year no matter what size the company is. This may also include performing an environmental assessment to identify barriers to healthy behaviors and potential environmental changes (i.e., vending machine selections). These changes can often be done at low cost. Environmental changes are important to help employees achieve and maintain health improvements.

## Step Four: Craft an Annual Operating Plan

An operating plan provides the wellness team with guidance as it considers the organization's needs and priorities while articulating specific goals and objectives. The operating plan is the central document that serves as the key piece of communication to leadership and stakeholders as to what the wellness program will accomplish. In short, the operational plan keeps everybody moving in the right direction.

**Goal:** Create an operating plan that considers the organizations business priorities, lists specific goals and objectives, while helping the wellness team set goals and develop an action plan for achieving them.

## The Elements of an Operating Plan

- **Vision/Mission Statement**  
Is a one or two sentence statement that illustrates the future you are trying to achieve, what the wellness program will accomplish, and how it integrates with your company's business goals or priorities.
- **Goals**  
A typical plan will have broadly defined statements about your wellness program. These goals (typically 5-7) will describe what you will try to achieve with your program with the end result of being able to demonstrate measurable objectives and outcomes (i.e., increased participation in wellness programs, reduced absenteeism, lower health care costs).
- **Objectives**  
Objectives should be short and concise statements that define the planned or intended outcome. They must be specific, measurable, achievable, realistic, and time sensitive (SMART). Roles and responsibilities for completion of objectives ideally should be aligned with individual strengths/talents.
- **Rationale**  
Rationale is driven by data that provides the reason each goal and objective was chosen. Data typically comes from a formal health risk assessment, employee interest survey, or other identified data sources.
- **Implementation**  
Formally set-up programs with a specific plan and deadline that are set to be offered to employees that address each goal and objective.
- **Timeline**  
A well organized timeline provides detailed information such as the start date and completion date of all major activities and milestones of all major activities of the program.
- **Budget**  
A budget provides detailed financial information pertaining to costs (administrative, personnel, program) and expenditures associated with your wellness program.
- **Communication Strategies:**  
Explains how the wellness program will be promoted throughout your organization. The following communication channels can be used to generate awareness and participation:
  - Flyers/Posters/Payroll Stuffers
  - Senior Management distributes written, voice mail or e-mail messages
  - Promote at staff meetings and management meetings
  - Wellness newsletter or wellness section in employer newsletter
  - Talk it up to coworkers
- **Evaluation Plan:**  
An evaluation section simply outlines how you plan to measure and evaluate the results and progress that occur from your program. Evaluation measures can and should include things like participation, participant satisfaction, changes in knowledge, attitudes and behaviors, and ultimately changes in environment and culture.

Examples of potential measurements include:

- Process Evaluation - how well was the program implemented?
  - An employee satisfaction survey and a survey of wellness team members would be helpful to assess program implementation.
- Impact Evaluation - were your immediate outcomes achieved?
  - Evaluates levels and knowledge, behavior change, and skills of employees
- Outcome Evaluation - were long term goals achieved?
  - Evaluates mortality, morbidity, disability, absenteeism, and healthcare costs

## Step Five: Choose Appropriate Interventions

Serving as a blueprint, your operating guide will help you determine what interventions (programs) to implement at your worksite. Keep the following questions in mind as you begin to consider potential interventions:

- What would senior management like the program to achieve?
- What activities do employees want to participate in?
- What resources are available for the wellness program?

Answers to these questions will greatly help the wellness team determine which interventions would be most effective. Drawing on the results gathered from your health assessment, culture audit, and employee interest surveys will also help in identifying wellness programs that will be embraced by employees.

**Goal:** To identify appropriate interventions that will result in the creation of positive health impacts, increase awareness to modify harmful health behaviors, and align with current organizational priorities.

**Additional questions that the wellness team should consider in identifying appropriate interventions include:**

- What specific objective does this intervention address?
- How many employees are targeted to participate in this intervention?
- What incentives will be used?
- How will the intervention be promoted and distributed?
- How long will the intervention take to complete?
- What is the total cost to deliver this intervention?
- Are there any legal issues to be considered?
- How will the interventions be evaluated?
- Who is the key contact regarding questions?
- What does industry research identify and support as best practices?

## Types of Programs

### **Awareness Programs**

Awareness programs rarely change behavior. They do, however, set the stage for behavior change by helping people to recognize health issues and giving them a reason to “take action”. Wellness challenges are an example of this type of intervention as they often challenge employees to make small behavioral changes over a defined period of time to support a healthy lifestyle enabling them to make healthier lifestyle changes.

- Link to Medica.com health challenges materials or list challenges individually
- Shape-Up
- Rate Your Plate
- Chill Out

### **Behavioral Programs**

Behavioral programs help employees become comfortable with the idea of making lifestyle changes. They target a specific health behavior, such as diet or physical activity, and provide comprehensive tools, that motivate participants to make long-term lifestyle changes.

- Link to Medica.com health challenges materials or list challenges individually
- My Health Manager Healthy Living Programs
- Health & Wellness Coaching

These programs can be offered at the awareness, education, behavior change or cultural enhancement levels. In addition, interventions can be offered monthly, quarterly, annually, or every 24 months depending on the needs of the employees.

## **Step Six: Create a Supportive, Health-Promoting Environment**

A comprehensive wellness program should include both behavioral and environmental interventions. Organizations must not only focus on individual risk and emphasize individual responsibility for health, but should also examine how the workplace influences individual behavior. The worksite has the ability to support employees as they work to maintain a healthy lifestyle. When creating a supportive work environment, the wellness team should focus on creating physical settings, policies, and ongoing programs that encourage employees to adopt healthy lifestyles. Patience and determination are important when trying to change the workplace environment and internal policies.

**Goal:** Create a comprehensive wellness program that focuses on creating physical settings, policies, and ongoing programs that utilize both behavioral and environmental interventions to support employees to maintain healthy lifestyles.

### **Example:** *Stairwell Enhancement*

By making simple low-cost improvements to your stairwells, you will motivate employees to take the stairs instead of the elevators. Such improvements include posting stair prompts (attractive signs suggesting stair use at elevators and entries), allowing stairwell re-entry for staff, making stairwells more attractive and encouraging use. To learn more, visit the Center for Disease Control’s “Stairwell to Better Health” website: [www.cdc.gov/nccdphp/dnpao/hwi/toolkits/stairwell](http://www.cdc.gov/nccdphp/dnpao/hwi/toolkits/stairwell)

Policies help create a culture of health and wellness at the worksite by making the work environment more conducive to a healthy lifestyle. Such policies include healthy food at work functions and a smoke-free workplace. Over time it is important to develop specific strategies for systemically improving the physical working environment of employees. In creating a supportive environment, the following areas are ideal in creating supportive policies, physical modifications, and rewards and incentives.

- Physical Activity
- Tobacco Use
- Nutrition/Weight Management
- Workstation/Ergonomics
- Alcohol/Drug
- Stress-Management
- Seatbelt Safety
- Safety/Emergency Procedures
- Organizational Benefits

To get you started on the right path, complete the Well Workplace Checklist on the Wellness Council of America's website: [www.welcoa.org/wellworkplace](http://www.welcoa.org/wellworkplace) It will help you understand the areas that have been well-addressed within your organization and those that still need attention.

## Step Seven: Evaluate Outcomes

Wellness coordinators and wellness teams can determine the value of their efforts and improve on future initiatives by consistently evaluating outcomes. Evaluations also provide employees with the opportunity to offer their opinions on what worked and changes they feel would improve future initiatives. A sound evaluation strategy allows for better understanding of which elements of the program are working and which need attention.

**Goal:** Carefully examine your wellness program determining the effectiveness of your interventions while also demonstrating the value of your program to management to improve on future endeavors.

A basic evaluation should consist of an employee satisfaction survey to assess how well the program was implemented and determine overall satisfaction of the program. Satisfaction surveys after events such as workshops, health fairs, and other wellness program sponsored events are also recommended. This will allow you or the wellness team to make adjustments as programs are rolled out to better meet employee needs. A more comprehensive will also assess the changes individual behaviors through a yearly Health Risk Assessment. Reports should be generated to assess the impact of the wellness programming on the health behaviors of the employee population.

### Benefits of Evaluating Outcomes:

- To identify if your intervention worked
- To determine the cost benefit of the intervention
- To compare the different types of interventions to determine most effective
- To provide information about the program
- To give feedback to the wellness team