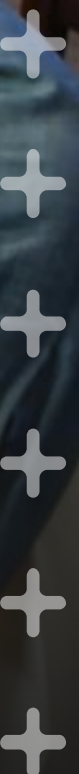




# Getting Started with Workplace Wellness



IMPORTANT NOTE: THIS TOOLKIT IS DESIGNED FOR FULLY-INSURED GROUPS WITH MORE THAN 50 MEMBERS ENROLLED IN PROVIDENCE HEALTH PLAN





# Getting Started with Workplace Wellness

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This toolkit is designed to help you implement and sustain a successful workplace wellness program. We want to make it easier for you to build a culture of wellness in your workplace and help your employees improve their well-being. In this toolkit, you'll learn how to identify your organization's interests and needs, design impactful initiatives, engage your employees and evaluate your workplace wellness program.

Our Providence team is here to help. Contact your Health Management Consultant or Account Manager for more information.





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# Employee well-being matters



Workplace wellness is focused on promoting health and safety at your workplace and improving the overall well-being of your employees. Employees spend much of their time at work, making it a great place to promote healthy habits. As an employer, you can have a positive influence by creating a workplace that fosters and supports well-being. An effective wellness program can facilitate a cultural change that reaps longer-term benefits at your workplace and ultimately impacts your bottom line in a positive way through:

- + Reduced absenteeism and increased productivity<sup>1,2</sup>**
  - + Healthier employees miss fewer days of work. When employees are in good health, they're typically happier and more productive.
  
- + Engaged employees and improved morale<sup>1</sup>**
  - + Fostering a healthy workplace can help you retain high-performing staff. Employees tend to notice when you make an effort to help them feel good. By uniting employees around a common cause and empowering them to participate through challenges or other healthy activities, you improve morale and build camaraderie. Employees who support each other along the journey to better health are more likely to stick with it.
  
- + Decreased rates of illness and injury<sup>1,2</sup>**
  - + Healthier employees typically use less health care benefits, including worker's compensation. Less healthy employees, however, tend to incur health care costs proportionate to their number of risk factors.
  
- + Improved employee recruitment and retention<sup>1</sup>**
  - + You may attract potential employees who want to work at an organization committed to their well-being and quality of life. Employees are increasingly seeking employment with organizations whose values align with their own. Also, you may find that business and community affiliates are more interested in partnering with you because of your dedication to workforce wellness.

1. [Workplace Health Model](#) – Centers for Disease Control and Prevention

2. [Total Worker Health: Making the Business Case](#) – The National Institute for Occupational Safety and Health





# Getting started



## Attain leadership support

Your leadership team will need to support your wellness initiatives. Support from leadership reinforces the message that employee well-being is valued by your organization and promotes a culture of health. Be prepared to discuss the goals of your wellness program and what you need from them – things like financial resources, support in communicating initiatives and engagement at all levels of leadership. You can read more about this in the ENGAGE section.

If leaders are not already on board, prepare a business case for launching a wellness program. This should include things like program history or current state and proposed future state such as budget recommendations, leadership involvement, evaluation plan and timeline. Connect the proposed wellness program to the organizational mission, vision or goals.

## Organize a wellness committee

Once you have your organization's leadership team support, identify a program coordinator and start forming a wellness committee. This group is responsible to plan and coordinate all of the aspects of your wellness program. You may also need to recruit additional volunteers to help with various activities throughout the year.

### Program Coordinator

A program coordinator champions the wellness program and oversees the wellness committee. This may include recruiting committee members, managing roles and responsibilities of committee members, delegating tasks and organizing events. As you develop your wellness program, keep thorough documentation. This will come in handy when evaluating your program or if there is staff turnover. The program coordinator should be a strong leader that works well with others and trusted within your organization.

### Wellness Committee

A wellness committee shapes the direction of the wellness program. Committee members help plan activities, raise awareness of upcoming events and represent employee needs. Other responsibilities include attending committee meetings, communicating with employees and management, encouraging participation in activities and evaluating the program. The ideal committee is composed of individuals from across the organization, including different departments and levels. Senior leaders may be on the committee but should not be the majority. The size of the committee varies by organization. Typically, limiting to no more than 10-15 individuals works best to allow for good input and collaboration, as well as provide adequate operational support to implement programs. If your organization has a safety committee, there may be natural overlap between them and the wellness committee.





## Organize a wellness committee



### A wellness committee offers many advantages, including:

- + Representation from different departments and levels
- + Allocate workload
- + Diverse ideas and viewpoints

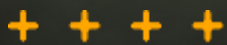
### When developing your wellness committee, consider:

- + Representation of the organization
  - + Members from different departments and levels
  - + Employees with health risk factors
  - + Union representation, if applicable
- + The skill set of your members
  - + Are they organized?
  - + Are they good at motivating people?
  - + Are they reliable?
  - + Are they respected and liked by other employees?
  - + Will they maintain confidentiality?

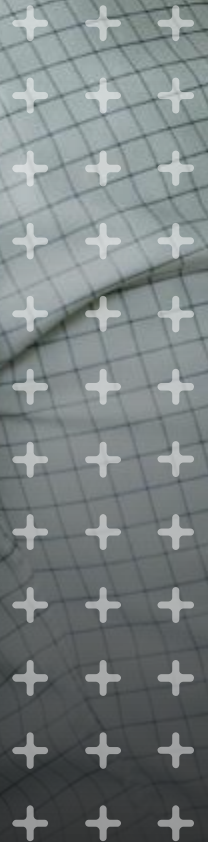




# Identify



Determine your organization's well-being interests and needs, so you can incorporate elements that will be valuable for your population.





# Identify:

## Determine interests and needs

Your workplace and your employee population is unique, so it's important to develop a program that targets personal and organizational health goals. Identify the needs and interests of your population by assessing factors that influence well-being, like:

- + Employee interests and health risks
  - + Collect data from an employee interest survey, a wellness assessment survey, a biometric screening event, and/or medical and pharmacy claims
- + Organizational culture, environment and policies
  - + Complete an organizational scorecard
- + Community impacts
  - + Assess how social determinants of health impact your population





# Use data to inform your program



Your wellness program should address the needs of the organization and the employees. There are three types of assessment to help you identify where to focus your efforts:

- + **Individual:** Assess your employees' areas of interest, lifestyle habits and health risks to incorporate initiatives that will resonate with your employees
- + **Organizational:** Understand the most prevalent health risks among your population and your organization's current workplace environment to incorporate initiatives that address the most costly areas and promote a culture of health
- + **Community:** Consider the impact the communities in which employees live, work and play has on their well-being to incorporate programs or benefits that support employees both at and away from work

## Utilize a variety of tools for collecting information:

01

### Employee interest survey

Ask your employees what their areas of interest and concern are

02

### Wellness assessment campaign

Encourage employees to complete a questionnaire about lifestyle habits and risks

03

### Biometric screening event

Host an on-site biometric screening to identify employees' health risks

04

### Data provided by your benefit partners

Your benefit partners may provide information like medical or pharmacy claims data to inform your program

05

### Organizational survey

Identify your organizations' strengths and opportunities regarding workplace wellness

06

### Social determinants of health (SDOH)

Consider how SDOH affect your employees and incorporate programs or benefits that address them



# Survey your employees



## 01 | Employee interest survey

Launch a survey to ask your employees what their areas of interest and concern are. This gives staff an opportunity to offer ideas for what they'd like to see in a wellness program. You can also include questions about what types of activities they would participate in, what incentives would motivate them to participate and what their communication preferences are. A survey is also a good place to ask who may be interested in participating on the wellness committee.

A sample [employee interest survey](#) is included in the Appendix. Modify the questions to fit the needs of your population, and then create your own online survey using free a platform like Survey Monkey or Google Forms.

## 02 | Wellness assessment campaign

The Providence wellness assessment is an online questionnaire that gives employees a picture of their overall health. Employees receive an overall wellness score, a health report to understand lifestyle risk areas and personalized recommendations to help improve their well-being.

Host a wellness assessment campaign to understand your employees' lifestyle habits, health risks and readiness to change. Encourage survey or wellness assessment completion by offering an incentive, like a gift card or a contribution to their health plan premiums. If more than 25 members complete the assessment you can request an aggregate population health summary report. For confidentiality, this summary excludes personal information.

Since wellness assessment data is self-reported, it is used frequently in conjunction with biometric screening results or medical and pharmacy claims information.

For more information on launching a wellness assessment campaign, contact your Account Manager or Health Management Consultant.

Click on the flyer to learn more about the wellness assessment



# Review employee health risk data



## 03 | Biometric screening event\*

A biometric screening provides insight into your employees' health risk factors. The screening is conducted by one of our vendor partners at your worksite and involves physical measurements, a blood pressure check and a blood test that measures cholesterol and glucose. This information will help employees establish a baseline and identify potential risk factors for various health conditions. Each participant receives a copy of their results at the time of their health screening and brief education on their results from the screener.

If more than 25 employees participate in the biometric screening event, you will receive an aggregate summary of the results. For confidentiality, this summary excludes personal information. This will allow you to identify risk areas to incorporate into your health and well-being strategy. Biometric screening data is one of the strongest data sets available to help define goals and track progress.

For more information on hosting a biometric screening event, contact your Account Manager or Health Management Consultant, or go to [our website](#).

*\*Note: Participation minimums and fees apply.*

## 04 | Data provided by your benefit partners

Ask your health insurance partners for information on medical and pharmacy utilization, as this can help you identify health risks to target in your wellness program. You can also ask your dental, vision and employee assistance program partners if they can share information on utilization or commonly requested resources.

For example, you can learn how frequently your employees are utilizing preventive benefits, how they are accessing services and what information they are seeking out. If annual preventive visits or flu shot vaccination numbers are low, you may consider incentivizing these activities in your program or hosting an on-site flu shot clinic.

Providence Health Plan offers health engagement reporting. Ask your Account Manager or Health Management Consultant for more information.

# Understand organizational and community impacts



## 05 | Organizational survey

When assessing well-being needs for your population, consider how the workplace environment and current policies impact employee health. This includes things like employee break policies, vacation and sick time policies, smoking areas, food served at meetings or company gatherings, or access to bike racks or lactation rooms. There are various tools to help you identify strengths and opportunities for improvement, such as:

- + [WELCOA Quick Culture Inventory](#) – A simple tool to help you identify gaps in creating a healthy culture for your employees
- + [HERO Scorecard](#) – A comprehensive survey that provides an overview as to how your program aligns with industry best practices

## 06 | Social determinants of health

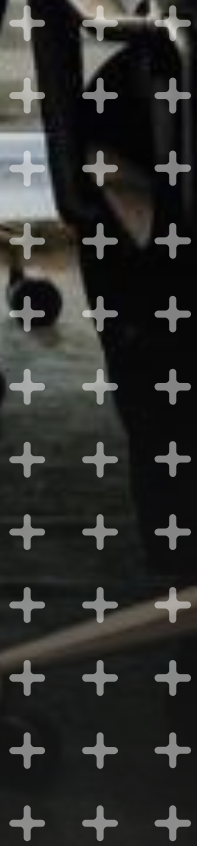
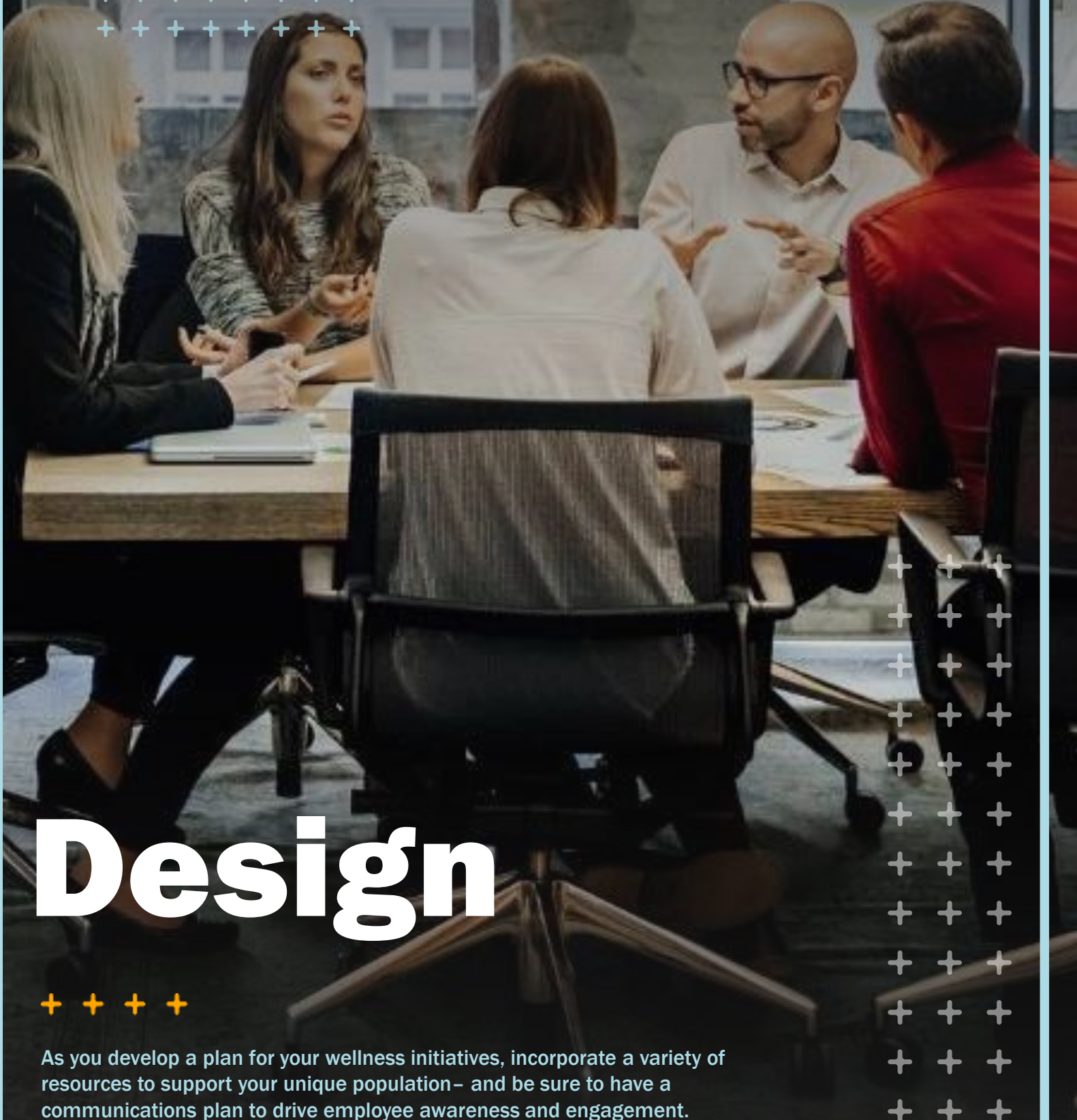
Social determinants of health, or SDOH, include individual factors like education, income, and level of stress as well as work-related dynamics such as job type, wages and the physical work environment. According to public health researchers, SDOH account for as much as 40 percent of an individual's health status – which could subsequently increase employer healthcare costs and decrease business performance.<sup>1</sup>

Evaluate how to remove barriers to access when implementing new policies or programs. In addition to physical health, establish programs to support the mental and financial well-being of all employees. Consider what SDOH have the largest impact on your employee population. For example, do many rely on public transportation or live in neighborhoods without sidewalks or safe places to walk? Do employees have children or provide care for an elderly relative? Maybe seeing a health care provider is challenging around work hours. Employers do not have direct control over SDOH, however you can make a difference. Consider supporting employees by:

- |                                                                                  |                                                          |
|----------------------------------------------------------------------------------|----------------------------------------------------------|
| + Providing paid time off for wellness visits and other preventive care services | + Creating a quiet room                                  |
| + Hosting an onsite flu shot clinic                                              | + Providing a transportation subsidy                     |
| + Creating a private space for telehealth appointments                           | + Offering a tuition reimbursement program               |
| + Offering backup childcare or eldercare benefits                                | + Creating volunteer opportunities                       |
| + Offering healthy food options and filtered water onsite                        | + Offering an onsite gym or access to safe walking paths |

Read more about Social Determinants of Health from [Health Enhancement Research Organization](#) (HERO).

1. [Social Determinants of Health](#) – World Health Organization



# Design



As you develop a plan for your wellness initiatives, incorporate a variety of resources to support your unique population– and be sure to have a communications plan to drive employee awareness and engagement.



# Design:

## Plan your initiatives

As you design the plan for your wellness program, make sure to include elements that will help hold you accountable in achieving success, such as:

- + Creating a program mission that aligns with your organization's objectives
- + Outlining short and long-term goals based on the needs and interests of your population
- + Allocating financial resources
- + Developing an annual plan that outlines what, when, and how success will be measured
- + Building a diverse communications strategy using multiple delivery channels



# Develop program mission and goals



## Create a program mission

Develop a mission statement so that all stakeholders understand your purpose and value. A mission statement, also known as a program purpose statement, is a broad description of the wellness program. A good rule of thumb is that it should also support your organizations' mission. When developing a program mission statement, consider the question, "Why does the wellness program exist?"

### Mission statement examples

- + The purpose of [name of program] is to provide activities and resources that promote a culture of health and wellness in the workplace, improving the quality of life and reducing health care expenses for all.
- + Our [name of program] is designed to improve the health of all employees and to reduce or eliminate issues affecting our health and work productivity. Our program seeks to motivate employees to adopt healthier behaviors and provide opportunities that foster positive lifestyle changes.

## Establish SMART program goals

Your mission statement may be broad, but goals should be clear and precise. Goals are based on information gathered in the IDENTIFY phase and should align with your program mission. To ensure success, set short-term and long-term goals and agree on benchmarks to evaluate your progress. Create SMART goals that are specific, measurable, attainable, realistic and time-based.

### Sample SMART goals

- + Launch an employee survey of wellness needs and interests by September 30
- + Host a summer walking challenge in July and obtain 70% participation
- + Increase the number of employees using the onsite fitness center by 10% by the end of year one
- + Host a annual biometric screening event in October
- + Increase the number of employees who have a primary care provider by 20% by the end of year two
- + Host a health fair in June

View our [strategy templates](#) in the Appendix. Use and modify the materials to fit the needs of your program.

# Allocate financial resources



## Establish a budget

Establishing a budget is a critical step because it will determine what activities and incentives to incorporate into your program. If you have access to a bigger budget, dedicate resources to events, incentives and communication materials. Don't let a small budget deter you – there are a lot of activities you can implement at no or low-cost such as a lunch walking group or employee volunteer program. For some activities, employee cost sharing is an option. For example, consider collecting a small fee from employees who participate in a wellness challenge and using the money to purchase prizes.

Reach out to partners including your health plan, dental, vision, retirement, and EAP providers and community organizations to see what free resources are available through them to build a comprehensive wellness program. They may offer onsite speakers, one-on-one sessions or giveaways at no cost.

Providence Health Plan offers an online wellness assessment, wellness challenges and on-site or virtual presentations at no cost. We may be available to attend your health fair, depending on the location. We also provide strategic development guidance, reporting and communication materials to support various wellness initiatives. You may also offer an onsite flu shot clinic at no cost if participation minimums are met.

As you create your budget, consider allocating resources for these expenses:

- + Program Manager salary
- + Vendor partnerships
- + Programs and activities
- + Incentives and swag
- + Memberships to wellness organizations
- + Policy and environmental changes
- + Meetings and continuing education
- + Program communications

Download our [budget considerations handout](#) in the Appendix for more examples.



## Determine incentives

Your wellness program does no good if nobody participates. Incentives can be effective in helping motivate and engage employees in developing healthy habits and in driving sustainable behavior change.

### Rewarding health actions

Offer meaningful incentives that align your wellness program goals. Consider rewarding health actions that target your risk areas and the behaviors you are trying to change. Remember that true health is different for everyone, so try to incorporate incentives that embrace holistic well-being.

Incentives fall into these categories:

- + Participation-based: Employees participate in a health related activity, but the reward is not tied to the results of the individual's participation
- + Standard-based, activity-only: Employees earn the reward for completing a specific activity
- + Standard-based, outcome-based: Employees must achieve or make progress toward a health-related standard to receive the reward

To ensure your incentives are achievable by all individuals, be prepared to offer potential alternative ways that a person may earn the reward, which is commonly referred to as reasonable alternatives.

### Types of incentives

Think about the types of incentives that are relevant to your population – consider using your employee interest survey to understand what motivates them. Align the value of your rewards with the time, effort, or energy needed to complete the health action(s). Try to include a combination of financial or cash-equivalent incentives along with social incentives. Popular incentives include merchandise, cash, gift cards, paid time off, health insurance premium discounts or raffles for high-cost items. You can also offer intangible, social incentives such as recognition in a team meeting.

To learn more about how other employers incentivize their populations, check out our [incentive ideas handout](#) in the Appendix and resources from these reputable organizations:

- + [HERO Scorecard – Industry Benchmark Reports](#)
- + Annual Health and Well-Being Survey from Fidelity Investments and Business Group on Health

## Legal considerations

Depending on your program's characteristics, different federal rules and regulations may apply, including the Affordable Care Act (ACA), Equal Employment Opportunity Commission (EEOC), Americans with Disabilities Act (ADA), Genetic Information Nondiscrimination Act (GINA), and Health Insurance Portability and Accountability Act (HIPAA). These rules are intended to balance an employer's interest in incentivizing employees to participate with requirements that prohibit discrimination based on health status, disability, and genetic information.

To ensure you are designing a compliant wellness program, we recommend consulting with your legal counsel. [Our website](#) and the following resources also provide valuable insights:

- + [Society of Human Resource Management \(SHRM\)](#)
- + [Arthur J. Gallagher and Co.'s Wellness Toolkit](#)

# Create an annual plan



Plan ahead by determining what activities you will offer, and when, over the course of the year. Remember to tie these to the SMART goals you already identified. Include what incentives will be offered for each activity, who will be eligible, and what your participation goal is. This will also help you to track when to communicate events to your employees.

Be thoughtful about planning activities and events around when you predict you will have the most participation. You may also wish to align wellness activities with other company events or national health observances.

Your plan should also include when you will make environmental adjustments or launch new policies. You will learn more about these in the ENGAGE section.

A [program calendar template](#) is included in the Appendix.

Check out  
our  
Workplace  
Wellness  
calendar  
for more  
ideas



## National Health Observances<sup>1</sup>

There are many National Health Observances throughout the year that you may consider tying into your theme, such as:

- + January – Cervical Health Awareness Month
- + February – American Heart Month
- + March – National Nutrition Month
- + April – Alcohol Awareness Month
- + May – National Physical Fitness and Sports Month; Mental Health Month
- + June – Men’s Health Month; National Safety Month
- + July – UV Safety Month
- + August – National Immunization Awareness Month
- + September – Fruits and Veggies More Matters Month; Whole Grains Month
- + October – National Breast Cancer Awareness Month
- + November – American Diabetes Month
- + December – Safe Toys and Celebrations Month

For more information on National Health Observances, visit

<https://healthfinder.gov/NHO/>

1. [National Health Observances](#) – U.S. Department of Health and Human Services Office of Disease Prevention and Health Promotion

# Build a communications strategy



## Communications Plan

Effective communication is essential to inform your employees about your program, generate buzz and create enthusiasm for participation. Work with your wellness committee to determine the best methods for communicating with employees – you'll need a diverse strategy to connect with your population.

Develop a schedule for when each communication will be sent - start early and communicate often through various methods.

### Tap into existing communication channels:

- + Email
- + Flyers
- + Postcards
- + Newsletters
- + Intranet
- + Social media
- + Team meeting announcements
- + Organization-wide events
- + New-hire onboarding or orientation
- + Leadership trainings

### Information to include in your communications:

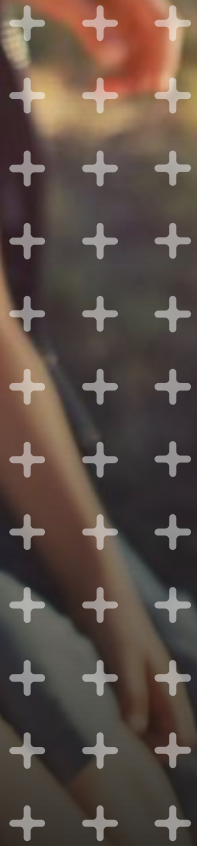
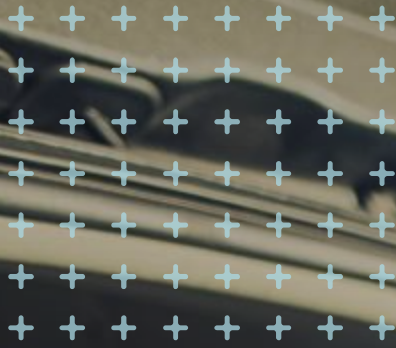
- + Program or event details
- + Program or event theme
- + Activities
- + Rewards, if applicable
- + Contact information for questions



## Communication Tips

Here are a few tips to help spread the word:

- + Modify the communication materials so they resonate with your employees and the organization's culture
- + Use a variety of communication methods
- + Get the messages to leaders – supervisors, wellness committee members, wellness champions and make it easy for them to share the information
- + Make it social. Use an organization-wide event like an all-staff meeting to help launch the program or event
- + Consider tying it to an incentive or promotion



# Engage



Implement initiatives that empower your diverse population to take action in their health and well-being.



# Engage:

## Implement initiatives

Health is a result of both individual actions and the environment in which people work, live and play. As an employer, you have the opportunity to impact your employee population in adopting healthy behaviors by creating a supportive workplace.

As you implement your initiatives, it's important to consider:

- + A holistic approach by including all dimensions of well-being
- + A relevant and comprehensive combination of strategies and interventions
- + Who will be accountable to help you implement the program
- + A diverse communications strategy
- + A meaningful incentive strategy
- + A plan for sustaining engagement





# Incorporate strategies for all dimensions of well-being



Well-being is an active process of becoming aware of choices and making decisions toward a more balanced and fulfilling life. We know our physical health is an important part of well-being, but it's more than that – it's also optimizing our mental and emotional health, financial health, social and community health, and our purpose. It's a dynamic process of change and growth, and true health is different for everyone.

Based on your population's health risks, think holistically about what habits, behaviors, and inputs are required to address these areas and support employees in making healthy behavior changes.

As you implement your well-being program, incorporate strategies for all dimensions of well-being:

**01**

## Physical

Physical well-being relates to the ability to maintain a healthy quality of life and seeking care when needed. It's attained through movement (endurance, strength, and flexibility), eating well, and getting adequate sleep. It's important to practice self-care, access preventive care, and manage risk factors and health conditions.

**04**

## Social + Community

Social well-being is the ability to relate to and connect with others – family, friends, coworkers, and community members. You have positive, supportive relationships and have feelings of belonging. You're committed to taking care of and improving your community and you encourage healthy living.

**02**

## Mental + Emotional

Emotional well-being relates to the ability to acknowledge, accept, and express feelings and manage emotions. Being emotionally well allows you to understand and appreciate others, be resilient, and feel happy. It also means that you're able to effectively cope with stress and deal with life's challenges.

**05**

## Purpose

Having purpose relates to aligning your values with your actions. At work, this means you enjoy your career and you're able to apply your skills and talents in a way that's meaningful and rewarding.

**03**

## Financial

Financial well-being is the ability to effectively manage your current and future economic life. You have control of day-to-day finances, you have the ability to make choices that allow you to enjoy life, you're on track toward you long-term financial goals, and you're prepared to handle stressful life moments.

Download our [industry resources flyer](#) for programs, policies, environmental changes, and benefit and perk ideas that support a holistic approach to well-being.





# Incorporate relevant strategies and interventions



In order to support the needs and interests of your diverse population, it's important to incorporate a combination of individual and organizational strategies across multiple channels.

Think about how you can use multiple interventions to target a key health risk – and also which interventions can effectively address multiple health issues.

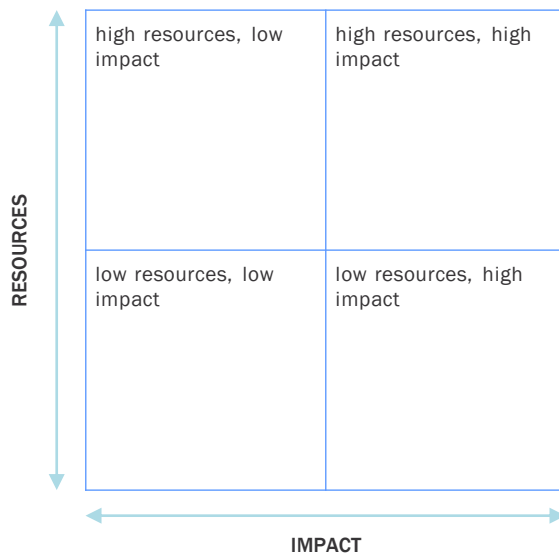
As you implement your well-being program, incorporate a variety of interventions:

- + Programs
- + Policies
- + Environmental changes
- + Benefits and perks

## Use an impact matrix to determine your strategies and interventions

An impact matrix is a tool that can help you translate your program strategy into meaningful action by prioritizing your interventions by the amount of resources needed and the anticipated impact to your population.

[Download the resource in the Appendix.](#)



# Incorporate relevant strategies and interventions



## Programs

Programs are opportunities available to employees at the workplace or through outside organizations to begin, change or maintain health behaviors<sup>1</sup>

- + **Physical:** onsite flu shot clinics
- + **Mental + emotional:** health coaching
- + **Financial:** onsite workshops
- + **Social + community:** donation drive
- + **Purpose:** opportunities for professional development

## Environmental changes

Environmental changes refer to modifications of the physical factors at and nearby the workplace that help protect and enhance employee health<sup>1</sup>

- + **Physical:** access to drinking water, dedicated eating spaces, secure bike storage
- + **Mental + emotional:** restorative indoor/outdoor spaces
- + **Financial:** free or discounted better-for-you foods and beverages, free onsite fitness classes
- + **Social + community:** smoke-free environment
- + **Purpose:** breakrooms/spaces to collaborate

## Policies

Policies formal or informal written statements that are designed to protect or promote employee health<sup>1</sup>

- + **Physical:** healthy vending guidelines, ensure fruit and vegetable availability
- + **Mental + emotional:** mental health days, mental health education for managers
- + **Financial:** paid time off
- + **Social + community:** promote civic engagement, health-oriented mission
- + **Purpose:** flexible schedules, parental leave

## Benefits and perks

Benefits and perks are part of an overall compensation package including health insurance coverage and other services or discounts regarding health<sup>1</sup>

- + **Physical:** Active&Fit Direct
- + **Mental + emotional:** Live and Work Well, Employee Assistance Program (EAP)
- + **Financial:** 401(k) contribution, tuition reimbursement program
- + **Social + community:** LifeBalance, child and elder care discounts
- + **Purpose:** leadership development program

We included a few examples for each type of intervention to get your mind thinking of ideas that may be relevant for your population. Be sure to check out the [Providence Health Plan Health + Well-being Resource Guide](#), our insights on this year's [well-being trends](#), and our recommended [industry resources](#) to learn more.

<sup>1</sup> Centers for Disease Control and Prevention





## Accountability of implementation

As the program leader, you are responsible for executing a well-being strategy that drives employee engagement, organizational energy, and productivity. It's important that leaders at all levels and supportive and engaged in your program. Become comfortable allocating responsibilities to well-being committee members, well-being champions, your leadership team, and managers of people. Remember, true health is different for everyone, so be sure to encourage your leaders to engage in ways that are meaningful to them.

## Communications strategy

You've already designed your communications strategy – now it's time to communicate it effectively to leaders and employees, at the right time, in the right place. Remember to promote the brand of the program, use multiple modalities to share your message, develop targeted and tailored messages to reach specific subgroups, and have a plan for ongoing communications.

## Incentive strategy

During the planning process, you learned how incentives can help employee engagement. You may have allocated part of your budget to implement participatory or health-contingent rewards. As you implement your incentive strategy, remember to reward health actions that are relevant, attainable and accessible for all employees.

### Keep your employees engaged by implementing these best practices:

- + Take a holistic approach incorporating all dimensions of well-being
- + Attain leadership support and engagement across all levels, from senior leaders to mid-level managers to employee champions
- + Provide relevant and ongoing communications - consider hosting all your program information in one spot that's easy for employees to access
- + Incorporate individual, team and organizational opportunities for employees to engage in the program – try to align them with your program objectives
- + Continue to review program performance data and integrate it into your strategy, programming, and communications





## Want to learn more?

++++

Download resources from these reputable organizations:

**Providence Health Plan Workplace Wellness**

[healthplans.providence.org/fittogether/fit-for-your-workforce/](https://healthplans.providence.org/fittogether/fit-for-your-workforce/)

**Business Group on Health**

[businessgrouphealth.org/topics/well-being-and-workforce-strategy](https://businessgrouphealth.org/topics/well-being-and-workforce-strategy)

**Centers for Disease Control and Prevention**

[cdc.gov/workplacehealthpromotion/index.html](https://cdc.gov/workplacehealthpromotion/index.html)

**Society for Human Resource Management**

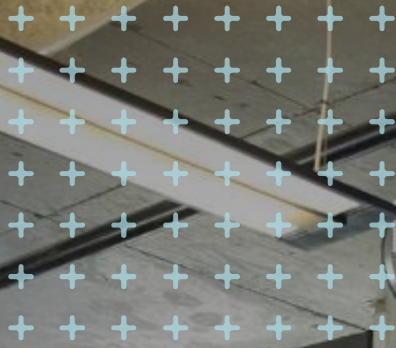
[shrm.org/wellness](https://shrm.org/wellness)

**Healthy Living, American Heart Association**

[heart.org/en/healthy-living](https://heart.org/en/healthy-living)

**Health Enhancement Research Organization**

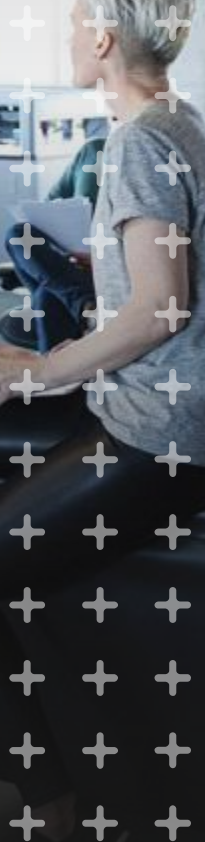
[hero-health.org/resources/all-resources/](https://hero-health.org/resources/all-resources/)



# Assess



Evaluate your initiatives to identify gaps and strengthen program offerings.





# Assess:

## Evaluate your program

In order to understand if you achieved the objectives you set for your wellness program, you need to measure them. An effective evaluation strategy can help you foster continuous improvement, demonstrate outcomes to leadership, understand financial impacts, and understand the impact on employee well-being, engagement and satisfaction.

As you design your evaluation strategy, it's important to consider:

- + Participation and engagement
- + Satisfaction
- + Productivity and performance
- + Organizational impact
- + Health and well-being impact
- + Financial impact





01

## Participation and engagement

Measure how your employees interact with the program. Take note of the types of programs and formats that resonate with your population. Involvement can vary from participating in a single health action to engaging in programs throughout the year.

### How to measure it:

- + Participation in a specific health action or program
  - + Participation report from external partner
  - + Self-reported participation
- + Engagement – ongoing participation over a defined period of time
  - + Engagement report from external report
  - + Self-reported participation over time

02

## Satisfaction

It's important to assess how the program is meeting employer and employee expectations. This can be related to overall satisfaction, effectiveness, scope of offerings, ability to access, communications, experience and value.

### How to measure it:

- + Overall satisfaction, effectiveness, value, scope of offerings, ability to access, communications, experience, value
  - + Employee interest survey
  - + Post-event feedback survey

03

## Productivity and performance

Consider measuring how employee health impacts their work by assessing the amount of time away from work due to poor health (absenteeism) and loss of productivity and performance due to health status (presenteeism).

### How to measure it:

- + Absenteeism due to poor health
  - + Reports of unscheduled absences, workers compensation, short/long term disability
- + Productivity
  - + Self-reported presenteeism
- + Performance
  - + Employee performance reviews
- + Turnover
  - + Reports on first-year turnover



## 04

## Organizational impact

Creating a culture of health requires an organization's commitment to employee well-being. This commitment can play an integral role in your recruitment and retention strategy. Create an environment that makes it easy, convenient, acceptable and expected to engage in healthy behaviors. In addition to assessing programs, policies, and environmental supports, it's important to assess how employees perceive both their leaders' and the organization's support of their well-being.

### How to measure it:

- + Organizational scorecard
  - + [HERO Scorecard](#)
  - + [CDC Worksite Health Scorecard](#)
- + Leadership support and accountability
  - + Employee survey
  - + Leadership scorecard
- + Rewards and recognition
  - + [American Heart Association](#)
  - + [Healthiest Employers](#)
  - + [C. Everett Koop](#)

## 05

## Health and well-being impact

Assess the impact of how programs affect the overall health of targeted populations – both their physical health and their mental and emotional health.

### How to measure it:

- + Physical and mental well-being
  - + Biometric screening values, e.g. BMI, blood pressure, total cholesterol, fasting glucose/HbA1c
  - + Self-reported health risks, e.g.: perceived stress and life satisfaction, anxiety [Wellness Assessment]
  - + Chronic conditions prevalence e.g. diabetes, hypertension [Health engagement reporting]
- + Health behaviors that impact well-being
  - + Self-reported behaviors, e.g. physical activity, fruit and veggie consumption, sleep, tobacco and alcohol use [Wellness Assessment]
  - + Preventive screenings, e.g. wellness visits, flu immunizations [Health engagement reporting]

## 06

## Financial impact

Use financial metrics and savings methodologies to determine financial outcomes. Improving and sustaining health status over time is needed to achieve savings. Be patient, as it can take 2-5 years to realize the impact on health care cost trends and other financial outcomes<sup>1</sup>.

### How to measure it:

- + Claims savings
  - + Chronic v. non-chronic trend comparison
  - + Participant v. non-participant trend comparison
- + Avoidable emergency room visits
- + Program participants' changes in lifestyle-related health risks or clinical outcomes

<sup>1</sup> [Health Enhancement Research Organization \(HERO\)](#)

## **Program Results**

Using a variety of data collection methods can help give you a better overall picture of your program's results. Although you want to use a variety of methods, remember to focus on the data that helps you evaluate your objectives and goals set in your action plan.

Remember to regularly share your program's performance data with stakeholders – senior leadership, managers, employees and external partners. In addition to measuring progress and striving for more effective programs and outcomes, sharing results can also help show leadership the program's value on investment.

## **Take action**

Using this four-step approach along with the tools and resources provided in this toolkit will equip you to take action in launching your workplace wellness program. You're on your way to creating a happier, healthier, and more productive workplace!



# Appendix

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# Getting started with workplace wellness

Investing in workplace wellness can have a positive impact on employee health, organizational culture and even the communities where we live, work, and play. Take purposeful action by implementing an integrated approach to employee health and well-being following these steps:

## 1 Identify

### Use data to inform your program

Your workplace and your employee population is unique, so it's important to develop a program that targets personal and organizational health goals. Identify the needs and interests of your population by assessing factors that influence well-being, like:

- + Employee interests and health risks
  - + Collect data from an employee interest survey, a wellness assessment survey, a biometric screening event, and/or medical and pharmacy claims
- + Organizational culture, environment and policies
  - + Complete an organizational scorecard
- + Community impacts
  - + Assess how social determinants of health impact your population

## 3 Engage

### Implement your initiatives

Health is a result of both individual actions and the environment in which people work, live and play. As an employer, you have the opportunity to impact your employee population in adopting healthy behaviors by creating a supportive workplace.

As you implement your initiatives, it's important to consider:

- + A holistic approach by including all dimensions of well-being
- + A relevant and comprehensive combination of strategies and interventions
- + Who will be accountable to help you implement the program
- + A diverse communications strategy
- + A meaningful incentive strategy
- + A plan for sustaining engagement

## 2 Design

### Plan your initiatives

As you design the plan for your wellness program, make sure to include elements that will help hold you accountable in achieving success, such as:

- + Creating a program mission that aligns with your organization's objectives
- + Outlining short and long-term goals based on the needs and interests of your population
- + Allocating financial resources
- + Developing an annual plan that outlines what, when, and how success will be measured
- + Building a diverse communications strategy using multiple delivery channels

## 4 Assess

### Evaluate your initiatives

In order to understand if you achieved the objectives you set for your wellness program, you need to measure them. An effective evaluation strategy can help you foster continuous improvement, demonstrate outcomes to leadership, understand financial impacts, and understand the impact on employee well-being, engagement and satisfaction.

As you design your evaluation strategy, it's important to consider:

- + Participation and engagement
- + Satisfaction
- + Productivity and performance
- + Organizational impact
- + Health and well-being impact
- + Financial impact



Making healthy choices feels great, but isn't always easy. Whatever health is to you, we want to help you get there. That's why we want to start a wellness program at [ORGANIZATION]. Complete this short survey and tell us what interests and matters to you.

**Which wellness topics would you like to learn more about at work? Check all that apply.**

- |                                                                                                              |                                                                                                         |
|--------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Physical activity and fitness                                                       | <input type="checkbox"/> Financial health – budgeting, investments, paying off debt, etc.               |
| <input type="checkbox"/> Nutrition and healthy eating                                                        | <input type="checkbox"/> Preventive health                                                              |
| <input type="checkbox"/> Weight management                                                                   | <input type="checkbox"/> Self-care                                                                      |
| <input type="checkbox"/> Mental health – stress reduction, anxiety, depression, gratitude, mindfulness, etc. | <input type="checkbox"/> Alternative care – massage therapy, chiropractic, etc.                         |
| <input type="checkbox"/> Sleep                                                                               | <input type="checkbox"/> My health status and numbers (blood pressure, BMI, cholesterol, glucose, etc.) |
| <input type="checkbox"/> Quitting smoking/tobacco                                                            | <input type="checkbox"/> Health coaching                                                                |
| <input type="checkbox"/> Workplace safety                                                                    | <input type="checkbox"/> Diabetes prevention                                                            |
| <input type="checkbox"/> Community – volunteer opportunities, sustainability at work, etc.                   | <input type="checkbox"/> Parenting                                                                      |
| <input type="checkbox"/> Career development                                                                  | <input type="checkbox"/> Elder care                                                                     |
| <input type="checkbox"/> Work/life balance                                                                   | <input type="checkbox"/> Other – tell us!                                                               |

**How would you prefer to engage in wellness programs and activities? Check all that apply.**

- |                                                                          |                                                 |                          |                          |                          |
|--------------------------------------------------------------------------|-------------------------------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> Computer/webinars                               | <input type="checkbox"/> Company events         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Smartphone/mobile app                           | <input type="checkbox"/> Team meetings          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> In-person class during the workday              | <input type="checkbox"/> Healthy habit tracking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Lunch and learn workshops                       | <input type="checkbox"/> Other – tell us!       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Health improvement competitions/team challenges |                                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**What time works best for you to participate in onsite programs and activities?**

- |                                       |                                     |
|---------------------------------------|-------------------------------------|
| <input type="checkbox"/> Before work  | <input type="checkbox"/> Afternoon  |
| <input type="checkbox"/> Morning      | <input type="checkbox"/> After work |
| <input type="checkbox"/> During lunch |                                     |

**How would you prefer to receive wellness information?**

- Announcements at team/company meetings
- Email
- Company website/intranet
- Flyers and handouts in common spaces
- Newsletters
- Mail to your home
- Other – tell us!

**How often would you prefer to receive wellness information at work?**

- Weekly
- Monthly
- Quarterly
- Annually
- Would prefer not to receive wellness information at work

**If rewards were offered for participating in our wellness program, what would motivate you to participate? Check all that apply.**

- Gift cards (e.g. outdoor retailers, grocery stores, massage)
- Merchandise (e.g. exercise equipment, fitness tracking devices)
- Cost reimbursement (e.g. fitness studio membership, community supported agriculture, health education class)
- Social opportunities/healthy events (e.g. volunteer events, food truck lunch)
- Paid time off
- Personal recognition
- Charitable donation
- HRA or HSA contribution
- Health care premium discount
- Other – tell us!

**What barriers stand in your way from participating in wellness-related activities during the workday? Check all that apply.**

- Lack of time/too busy
- Inconvenient location
- Lack of support from leadership
- Lack of motivation
- Privacy/confidentiality concerns
- Other – tell us!

**Organizational culture is an important part of workplace wellness. Which of the following statements do you agree with? Check all that apply.**

At [ORGANIZATION]:

- I am encouraged to lead a healthier lifestyle
- People support others who are attempting to lead a healthy lifestyle
- There are healthy food options available
- A smoke-free environment is promoted
- It is normal for people to exercise during the workday
- Management is committed to supporting employee health and well-being
- I believe my company cares about my health

**How do you want to improve your health? What support would be helpful in achieving your wellness goals?**

[Open response]

[Open response]

**Are you interested in being part of the wellness committee? If yes, please enter your contact information below.**

Name:

Email Address/Phone Number:

# Wellness Program Strategy

To foster a culture of well-being, you need to understand the purpose of your program, where you're going, and how you're going to get there. Align your wellness program's purpose, or mission, with your organization's framework. Based on your mission and identified employee health risks and interests, outline individual, organizational, and community initiatives to support all dimensions of well-being.

Organization Mission

Wellness Program Mission

Wellness Program Objective

Wellness Program Dimensions and Identified Opportunities

DIMENSION OF WELL-BEING	OPPORTUNITIES		
	Individual-level (Survey data, wellness assessment data)	Organizational-level (Policies, environment, benefits, culture)	Community-level (Social determinants of health)
Physical Well-being			
Mental + Emotional Well-being			
Financial Well-being			
Social + Community Well-being			
Purpose			

# SMART Goals

Based on your program mission and identified opportunities, intentionally develop data-driven goals that are meaningful to your population. SMART goals are specific, measurable, attainable, realistic and time-based. Creating short- and long-term SMART goals can help you can clarify your ideas, focus your efforts, and increase your chances of achieving your objectives.

DIMENSION OF WELL-BEING	SMART GOAL	EVALUATION METHOD(S)
<b>Short-Term Goals</b>		
<b>Long-Term Goals</b>		

# Action Plan

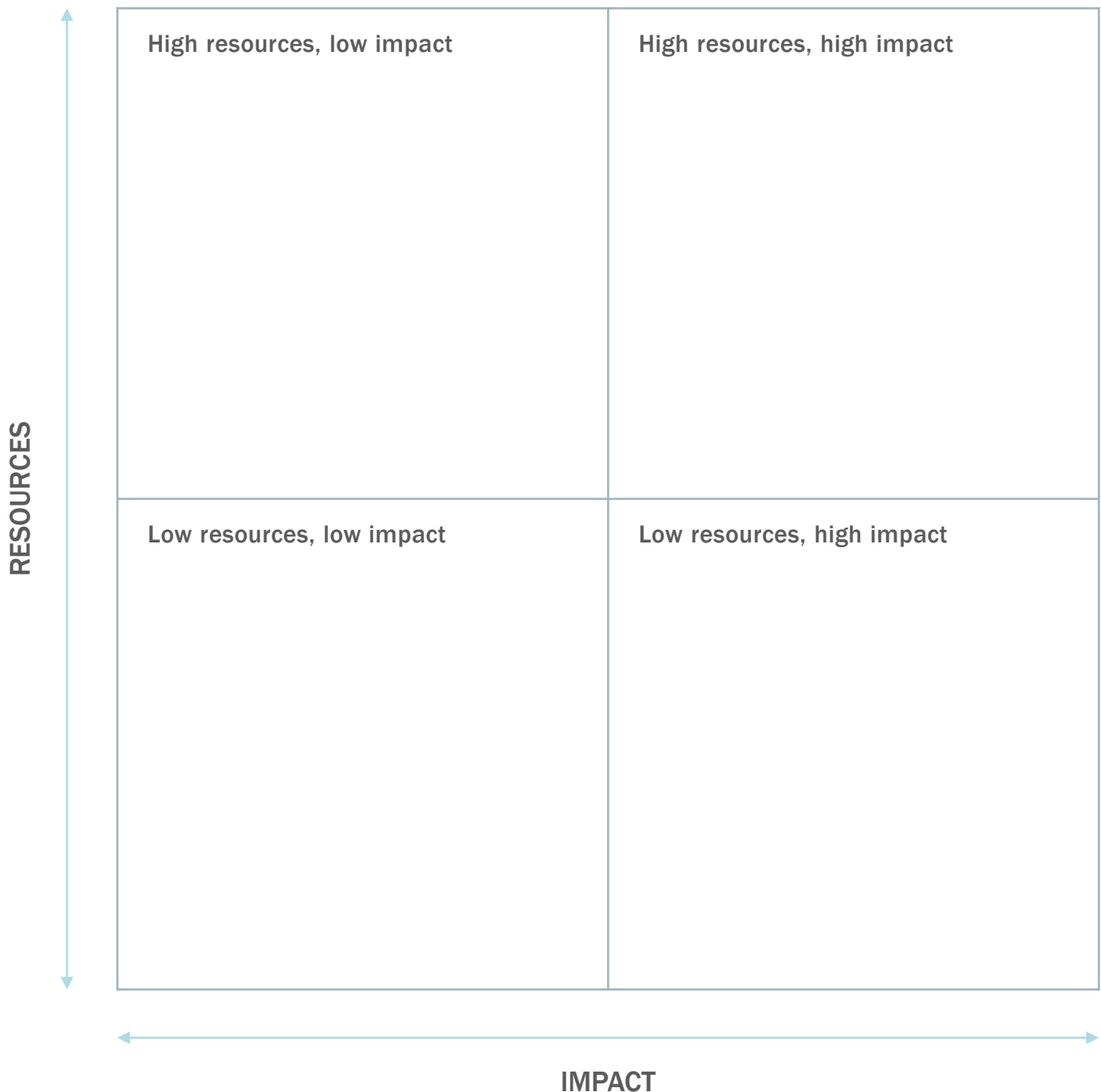
After you've analyzed your data and written program goals, outline a roadmap for the future. Identify specific activities, policies or resources you will use to reach your goal. Outline methods for evaluating the success of your initiatives.

SMART Goal				
Programs & Activities				
Policies & Environmental Changes				
Benefit Tools & Resources				
Evaluation Method(s)				
Baseline Measure				
Actual Result				

# Impact Matrix

An impact matrix is a tool that can help you translate your program strategy into meaningful action by prioritizing your interventions by the amount of resources needed and the anticipated impact to your population. Think about your program goals – and gather insights from internal and external partners – then work as a team to complete the matrix and determine your priorities and timeline.

Program Goal:



# Program Calendar

Lay out a plan for the year. Determine when will you host each activity or implement new policies and consider what communications are required. Include your incentive strategy and participation goals as applicable.

	Q1	Q2	Q3	Q4
Programs & Activities				
Policies & Environmental Changes				
Communications				
Complete the sections below as applicable				
Incentive				
Eligibility				
Participation Goal				
Actual Participation				



# Budget Considerations

Every employer's resources and priorities are different, so budgets aren't one-size-fits-all. Your budget should be tailored to meet your organization's goals and fit the needs of your employees. Below are some ideas for items you may need to consider in your program budget.

## Salary | Wages

- + Wellness Program Manager

## Partnerships

- + Fitness classes – yoga, bootcamp
- + Health education presentations – nutrition, sleep, emotional/mental well-being, financial health, etc.
- + Activity devices
- + CSA partnership/healthy food subsidies
- + App subscriptions
- + Annual transit passes/subsidy for active commuters
- + Weight management program
- + Alternative care – onsite massage
- + Child/elder care facilities
- + Financial planning and coaching
- + Health plan – wellness challenges, health coaching, care management, healthy discounts
- + Preventive care – biometric screenings, flu shots

## Programs and Activities

- + Health fair
- + Wellness day
- + Community 5k

## Incentives

- + Giveaways
- + Health plan incentives
- + Social events

## Memberships

- + Professional wellness organizations
- + Local wellness organizations

## Policy and Environmental Changes

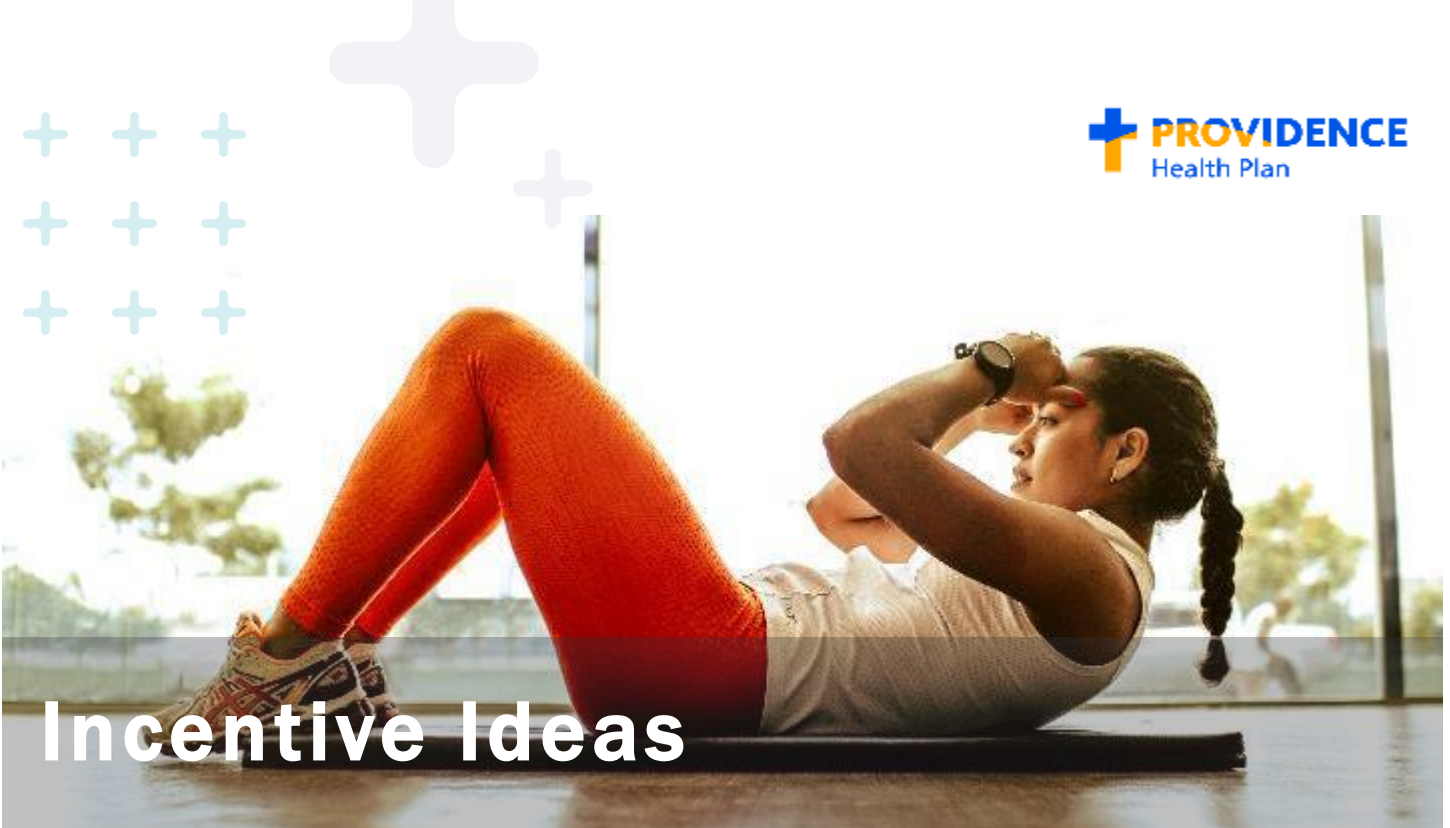
- + Healthy snacks and beverages
- + Flex time
- + Community wellness policies (volunteer time off)
- + Responsible alcohol policy
- + Tobacco-free policy
- + Bike racks/bike room
- + New mom's room/lactation room
- + Updated break spaces
- + Meditation space
- + Space for telehealth visits (ExpressCare Virtual) or an onsite clinic
- + Walking trails
- + Ergonomic desks or treadmill desks
- + Stairwell redesign
- + Onsite kiosk for blood pressure
- + Diversity and inclusion programs
- + Recognition programs
- + Recycling programs
- + Healthy checkout in cafeteria
- + Garden
- + Water bottle filling station
- + Office space – including temperature and lighting

## Meetings

- + Resources for wellness team meetings
- + Continuing education – national conferences, local events
- + Training for leadership
- + Job related training
- + Resiliency or mental health first aid training

## Miscellaneous

- + Program branding/communications



# Incentive Ideas

The role of an extrinsic motivator, such as an incentive, is to prompt employees to learn about health and well-being, engage in the organization’s wellness program, and begin behavior changes. Incentives can be divided into the following categories:

- + **Participation-based:** Employees participate in a health related activity, but the reward is not tied to the results of the individual’s participation
- + **Standard-based, activity-only:** Employees earn the reward for completing a specific activity
- + **Standard-based, outcome-based:** Employees must achieve or make progress toward a health-related standard to receive the reward

## Social

- + Recognition (at team or organization-wide event)
- + Wellness Champion designation
- + Lunch with leadership
- + Onsite food trucks
- + Career development opportunities
- + Financial advisor session
- + Designated parking spot
- + Casual Fridays
- + Volunteer events
- + Work from Home day
- + Wellness days (Paid Time Off)
- + Environment changes

## Giveaways

- + Health and wellness apps
- + Gift cards – outdoor retailers, grocery stores, fitness studio membership, massage
- + Meal or grocery delivery services
- + Sporting events or venues
- + Discounted or free registration – 5k, community education class
- + Annual transit passes
- + Community Supported Agriculture shares, cooking classes, cookbooks
- + Exercise equipment – bike, kayak, camping gear
- + Devices – Apple Watch, Fitbit, wireless headphones
- + Stand-up desks, bike desks, treadmill desks

## Tied to Health Plan

- + Reduced copay
- + Reduced deductible
- + HRA/HSA contribution
- + Premium reduction
- + Tobacco-free discount



## General Well-being

### Government Resources

- + Centers for Disease Control and Prevention
- + National Heart, Lung and Blood Institute
- + National Institute for Safety and Health - Total Worker Health
- + Oregon Health Authority

### National Organizations

- + American Heart Association
- + Business Group on Health
- + Health Enhancement Research Organization
- + National Wellness Institute
- + Society for Human Resource Management
- + Wellness Council of America

### Health Information Websites

- + Cleveland Clinic
- + Employee Benefits News
- + Harvard Health Publishing
- + Healthline
- + Journal of Occupational and Environmental Medicine
- + Mayo Clinic
- + Medline Plus (National Institute of Health)
- + My Health Finder (US Department of Health and Human Services)
- + SmartBrief Newsletters – AHIP Wellness
- + WebMD

## Physical Well-being

- + American Council on Exercise
- + Exercise is Medicine, American College of Sports Medicine
- + EatRight.org, Academy of Nutrition and Dietetics
- + Physicians Committee for Responsible Medicine

## Mental + Emotional Well-being

- + American Psychological Association
- + Mental Health America
- + National Alliance on Mental Illness
- + Your Employee Assistance Program partner

## Social + Community Well-being

- + Oregon Farmers Markets Association
- + Volunteer Match

## Financial Well-being

- + Consumer Financial Protection Bureau
- + Napkin Finance
- + Your Financial partner

## Purpose

- + Coursera
- + LinkedIn Learning
- + TED

Check out our Health and Well-being Resource Guide for additional information on the perks and benefits available to employers and members.



**We all deserve True Health**



For questions about your well-being program, contact

[WorkplaceWellness@providence.org](mailto:WorkplaceWellness@providence.org)

