



Winning at Wellness

Create a plan for healthy,
happy employees





Table of Contents

✓ Pillar 1: Invest in People	
• Assess and enlist leadership support	4
• Develop your wellness committee	5
• Survey employee interests	7
✓ Pillar 2: Environment and Culture	
• Develop a culture of better well-being	8
• Conduct a health-culture audit	8
• Evaluate policies and procedures	9
• Assess the built environment	11
• Apply the 5 Dimensions of Well-Being	12
✓ Pillar 3: Data, Design, and Deliver	
• Chart an annual well-being plan	14
• Collect meaningful data	15
• Set goals	16
• Encourage participation	16
✓ Pillar 4: Evaluation	
• Develop an evaluation plan	18
• Broaden your scope	19
• Look to compare costs and outcomes	20
• Communicate results to stakeholders	20

Appendix I: Sample Surveys & Forms

- Wellness interest survey
- Program evaluation survey
- Wellness event planning checklist
- Committee member commitment form

Appendix II: Programs Offered

- Value-added offerings
- Wellness consulting
- Additional resources

Introduction

You recognize the need to invest in your organization's most valuable asset—*people*. Helping employees become the best version of themselves results in greater engagement and a happier, healthier environment. Moreover, taking the steps to promote and support better well-being in the workplace not only bolsters productivity and the bottom line, it enhances lives, families, and communities. The following guide provides the strategy, steps, tips, and tools to launch your own workplace program—one that aims to foster and sustain a culture of better well-being.

Advocating for happy, healthy lives

By making employee well-being a priority, the reward can extend beyond an energized work environment: personnel retention improves, recruiting top talent gets easier, and a high-functioning organization becomes more adaptable to change. But how do you get there? It starts through a thoughtful strategy, leadership buy-in, and forming a team to identify and carry out action items. This guide provides a roadmap. Organized into four essential pillars, it gives you footing to pursue your organization's own unique journey.



5 Dimensions of Well-Being

In helping organizations create the conditions that inspire people to be their best in all aspects of their lives, PacificSource promotes the 5 Dimensions of Well-Being: emotional, physical, financial, community, and occupational. It's a concept every organization can adopt and tailor to its work culture and the needs of employees.

The four pillars to drive successful outcomes

Employees who are engaged in their work and committed to their organizations give companies crucial competitive advantages. At PacificSource, we believe that the most successful employee-driven programs incorporate four essential pillars:

- 1. Invest in People** – Engage and support stakeholders in employee well-being.
- 2. Environment and Culture** – Evaluate, plan, and develop a well-being strategy that supports the desired culture.
- 3. Data, Design, and Deliver** – Create and implement a roadmap that meets the organization's goals.
- 4. Evaluation** – Assess and report on ongoing opportunities and successes.

This workbook is meant to be your guide in planning and implementing an employee well-being program. It includes components we find to be essential in a successful wellness program, as well as resources to help implement continuous improvement.



“Customers will never love a company until the employees love it first.”

-Simon Sinek



Well-being and wellness

Well-being and wellness can be used interchangeably. Both encompass being the best version of ourselves, and include the **5 Dimensions of Well-Being**: our emotional, physical, financial, social, and occupational health.

PILLAR 1

Invest in People

- Assess and enlist leadership support
- Develop your wellness committee
- Survey employee interests

Assess and enlist leadership support

One of the key steps to any employee well-being program is having leadership support. Having the support of your executive team can help make the program a priority rather than a mere campaign. Others are more likely to get on board when they see that wellness is important to leadership and the overall culture of the organization. Employees can't be expected to embrace the idea of workplace wellness if management doesn't.

Invite your CEO or other executive-level personnel to be part of the wellness team. If you can enlist a known wellness advocate who's part of top management, you're likely to expedite support from the rest of the executive team.

Although CEOs and executive-level managers often share a focus on the cost of healthcare, be prepared to challenge them by explaining wellness benefits beyond finances.



Engaging individuals from all levels of your organization (mid-managers, in particular) can have a dramatic impact on whether wellness is promoted or impeded in their respective departments. Plus, these representatives have the power to influence engagement levels among their team members.



Activity

What are three things that are important or valuable to your leadership?

Examples might include turnover, absenteeism, healthcare costs, employee engagement, company culture, customer satisfaction, and a more productive workforce.

1. _____
2. _____
3. _____

How can you communicate the value of a worksite well-being program to match those values?

What is your “why” behind wellness? Why is it important to your organization to support employee well-being?

Develop your wellness committee

A well-being team (or wellness committee) can help propel the wellness strategy across the organization and infuse health and well-being into everyday work culture.

Wellness team members (sometimes referred to as “ambassadors” or “champions”) can serve as:

- Liaisons between the employee population and key stakeholders
- Mentors for cultural changes
- Communicators for positive messaging across the organization
- Connectors to engage with employees on a more personal level
- Advocates to create environmental changes that support healthy living

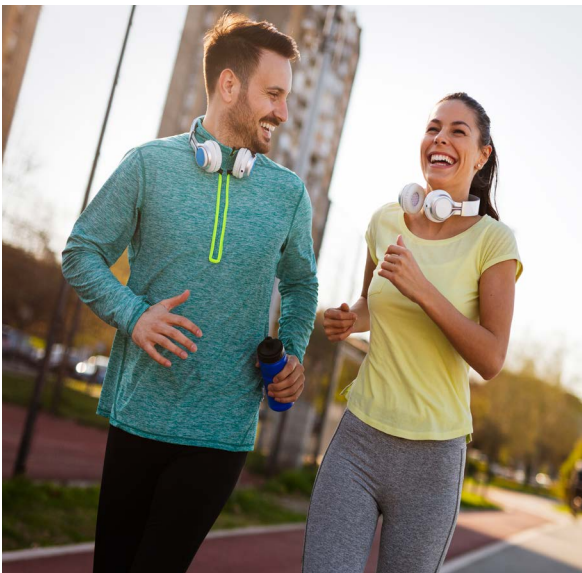
It will be important to include a discussion with upper management to seek their support and help them understand the role of the wellness team member.



The wellness team should function to distribute the responsibilities across the organization to provide a sense of ownership to all employees.



When assembling your wellness team, consider incorporating members in separate departments with varying responsibilities within the company. To ensure the team is well-rounded and multi-dimensional, recruit individuals who are interested in different aspects of well-being.



Roles and responsibilities

Identifying the roles and responsibilities expected from your well-being team members will be important for everyone. Expectations should include:

- Estimated time commitment to attend meetings and/or host trainings
- Specific areas of focus or subcommittees that would help further the goals and objectives
- Special projects or events they might contribute to or lead



Creating job descriptions and functions—and laying out roles and expectations—helps members fully commit. With greater understanding, members are more likely to value their contribution in creating a successful program and the overall health of the organization.



For an example, see the sample Roles & Responsibilities Form in **Appendix I**.

Finding your team of champions

There are a variety of ways to identify individuals to serve on your well-being committee. Ideally, you're able to talk to individuals who already have a passion for helping others (and contributing to the positivity in their work groups). Be sure to have representation from various departments, shifts, demographics, and levels of seniority.

Ways to find people with the *right stuff*:

- Ask members from the leadership team or human resources
- Query managers or team leads to identify representatives from varied departments
- Post a sign-up option where people can self-select or raise a hand



The whole is greater than the sum of its parts. Just like on a sports team, each person can play a unique and valuable role in order to get a lot accomplished. Also—when assembling a team—it helps to ask candidates why they want to be involved. Their reasons can help you fill certain roles with the right people.



Use the grid below to help organize helpful information for your wellness team members.

Wellness Team Members			
Name	Department/ Organization, Role, Location	Contact Information (email and/or phone)	Talents, Skills, and/or Well-Being Areas of Interest

Regular meetings

For well-being team members to fully support ongoing wellness initiatives and create a positive work environment, set a regular, consistent meeting schedule. This allows for effective communication, opportunities to discuss challenges and barriers, track progress, and report successes.

At the initial meeting, team members can explore expectations, learn about workplace well-being, and collaborate in the development of a mission statement, goals, and objectives.

Survey employee interests

Surveying your employees is a key component to knowing what they want in a well-being program and identifying opportunities as an organization. To get started, see the Well-Being Program Evaluation Survey sample in **Appendix I**. For questions about the questionnaire or help in administering a survey, contact your PacificSource Wellness Consultant.



PILAR 2

Environment and Culture

- Develop a culture of better well-being
- Conduct a health-culture audit
- Evaluate policies and procedures
- Assess the built environment
- Apply the 5 Dimensions of Well-Being

Develop a culture of better well-being

A culture that champions well-being promotes an environment where the healthy choice is the easy choice, as well as an organization that practices what it preaches. Culture is impacted by the work environment, company mission, values, expectations, and goals—all factors that serve as the foundation for a robust workplace well-being program.



Workplace culture is “the way things are done around here”

A workplace culture consists of unwritten rules about what it really means to be an employee. It’s also how people talk about their employer—and its values—when away from work.

Creating a healthy organization is no small task and may take years to move the needle. It’s also important to remember that improving culture is the shared responsibility between your organization and your employees. A great first step is to understand your current state or baseline by conducting a health-culture audit.

Conduct a health-culture audit

A health-culture audit is an assessment that helps you analyze the unwritten rules of your organization. For instance, does your organization promote tobacco cessation by hosting tobacco cessation classes, but lack a worksite policy that prohibits smoking onsite or in work vehicles? Is healthy eating a priority within your wellness program’s goals and objectives, yet unhealthy food choices remain in vending machines, at meetings, and other employee events? These scenarios send mixed messages, eroding the impact of your wellness program.

With a health-culture audit, you’re able to discover:

- Health practices and/or programs likely to positively impact the current workplace environment
- Aspects of your organization that fail to support (or interfere with) your wellness programming
- Which aspects of your culture do not align with your written policies
- Areas for improvement as they pertain to creating a culture of health and wellness



To conduct a culture audit, you can choose from a variety of free resources, including those provided in the **Appendix II**.

One of the most effective messages to support a culture of health is having leaders of the organization model the right behaviors. Leaders who walk the talk not only demonstrate what’s expected and how certain behaviors matter, but their actions also help transform a culture.

Evaluate policies and procedures

Policies are formal or informal practices and/or procedures to help support employee well-being. Even the best wellness activities won't be successful without the policies and procedures to support them. For instance, if you want to make walking meetings and lunch-break walks a regular part of the workday, consider how internal policies can encourage these behaviors and make them the new normal way of doing things.

When considering which policies to introduce, remember that policies don't necessarily need to be strict or enforced with consequences or a penalty. Instead, offer guidance that encourages positive behaviors.

To figure out whether your policies and procedures support well-being, start by assessing the two policy examples below. Then, discuss creating any new policies that might apply.

Policy Examples

Tobacco-Free Policy

We are a tobacco-free workplace and campus. No tobacco use is permitted within 100 feet from the buildings at any time. Employees who choose to use tobacco may do so outside, away from the campus.

Healthy Eating Policy

We value the health of our employees and commit that our workplace will:

- Make healthy changes to vending machines, cafeterias, meetings, events, and other sources of food and beverages in our workplace.
- Identify restaurants and food providers who offer healthier food and beverage options, and use these vendors in planning activities and events.
- Encourage leadership support and modeling for our healthy food and beverage efforts.
- Educate employees about healthy eating, build awareness, and promote healthier choices.
- Provide fruits and vegetables available at all company-related events.
- Limit sodium, added sugars, and saturated fats in our foods and beverages.



Activity

Tobacco-free policy

Healthy eating guidelines for company-related events, conferences, and potlucks

Breakroom and cafeteria food available



Activity *Continued*

Break times & lunch hour policies, including physical activity and/or mental health breaks

Indoor air quality standards

Worksite safety policies and procedures

Breastfeeding policy

Remote work and/or telecommuting

Paid time off and procedures for medical, personal, and/or family-related needs

When it comes to creating, defining, and refining policies, be sure the wellness committee meets on a regular basis to see how you can adapt your organization's policies and procedures to better support employee well-being.

For additional examples of healthy workplace policies, see **Appendix II**.



Assess the built environment

Built environment and culture are two components that have inherent impact on employee well-being. The built environment includes man-made structures, features, and facilities viewed collectively as the environment in which people work. Culture is the personality of a company composed of work environment, company mission, values, ethics, expectations, and goals. Both are important to consider when forming your employee well-being program.

Consider some examples to help identify what is currently in place that supports healthy decisions and behaviors.

Built Environment			
	Have	Don't have	Would like to have
Safe walking paths around location			
Ergonomically safe working environments			
Tobacco-free campus/vehicles			
Water stations			
Breakrooms			
Refrigerators/kitchen			
Bike racks			
Showers/locker rooms			
Access to healthy food near work or campus			
Designated lactation rooms for nursing moms			
Cafeteria with healthy food options			
Onsite fitness center/room			
Healthy vending-machine choices			
Designated quiet space for meditation or mental health breaks			
Other			

Apply the 5 Dimensions of Well-Being

Building a comprehensive well-being program requires a multifaceted approach. We encourage you to build a strong foundation for your well-being program by embracing the 5 Dimensions of Well-Being.



Emotional

Emotional well-being encompasses self-understanding, coping with life's challenges, independently managing feelings, and supporting others. In the workplace, emotional well-being can affect our ability to handle change. It can determine how we interact with colleagues, and how we handle workplace conflicts.

Examples: employee assistance program (EAP), mental health benefits and awareness campaigns, paid time off (PTO), telecommute opportunities, extended illness bank, designated spaces for mental health and/or meditation breaks, and more.



Physical

This dimension focuses on living a healthy life with enough energy to tackle daily commitments. Physical well-being can include getting enough restful sleep, moving your body, getting check-ups, making healthy food choices, and avoiding risky behaviors. Not to be overlooked, mental and dental health are also part of physical well-being.

Examples: flu shots, onsite fitness/wellness classes or seminars, walk/run challenges, fresh fruit in offices, condition support programs, gym discount program, Jenny Craig® or WW® (Weight Watchers) programs, preventive screening benefits, Teladoc®, and more.



Financial

Financial well-being is all about having a healthy relationship with money. It ranges from managing day-to-day expenses to setting realistic goals and expectations for planning your financial future. Offerings such as financial education on budgeting, credit management, or purchasing a home can also help individuals in their financial well-being.

Examples: retirement plans, EAP financial and legal assistance, medical and dental plans, financial educational webinars/seminars, tuition reimbursement, bonuses, and more.



Community

Community well-being includes the ability to relate to and connect with other people in the world. It can also focus on an individual's contribution to their social groups and communities where they live, work, and play. It also incorporates emotional connectedness and growth through healthy relationships and contributing to the common good.

Examples: volunteer hours, community partnerships, participation in charitable organizations, employee potlucks, interest groups, and more.



Occupational

Occupational well-being is focused on personal satisfaction and enrichment through work. It describes an employee's career growth, the development of skills, the sense of fulfillment one derives from work, and the ability to achieve intellectual growth, creativity, and innovation. It also includes maintaining a harmonious balance between work and personal life.

Examples: employee recognition awards, PTO, continuing education opportunities, funding for conferences/certifications, diversity/equity/inclusion trainings, tuition reimbursement, and more.



Activity

Fill in the worksheet below to help plan your organization's well-being strategy.

	What do we currently provide our employees to support them in this area?	What would we like to add to our current offerings?	What can we offer with our current capacity?
Emotional			
Physical			
Financial			
Community			
Occupational			

PILLAR 3

Data, Design, and Deliver

- Chart an annual well-being plan
- Collect meaningful data
- Set goals
- Encourage participation

Chart an annual well-being plan

Designing a strategic well-being plan is foundational to launching your program. Include aspects such as your mission and vision, goals and objectives, and the data that supports them. Your plan should be viewed as a living document to be updated over time.

You can work with your wellness team and PacificSource Wellness Consultant to design your annual well-being plan.



A few components to your well-being plan may include:

Mission statement – a formal summary of the aims and values of an established group
(*Example: Our mission is to provide safe and cost-effective transportation solutions for the markets we serve.*)

Your Mission:

Vision statement – the outcome you would like to see, or the result of your efforts over time
(*Example: We want to make our health and well-being program accessible to all employees.*)

Your Vision:



Collect meaningful data

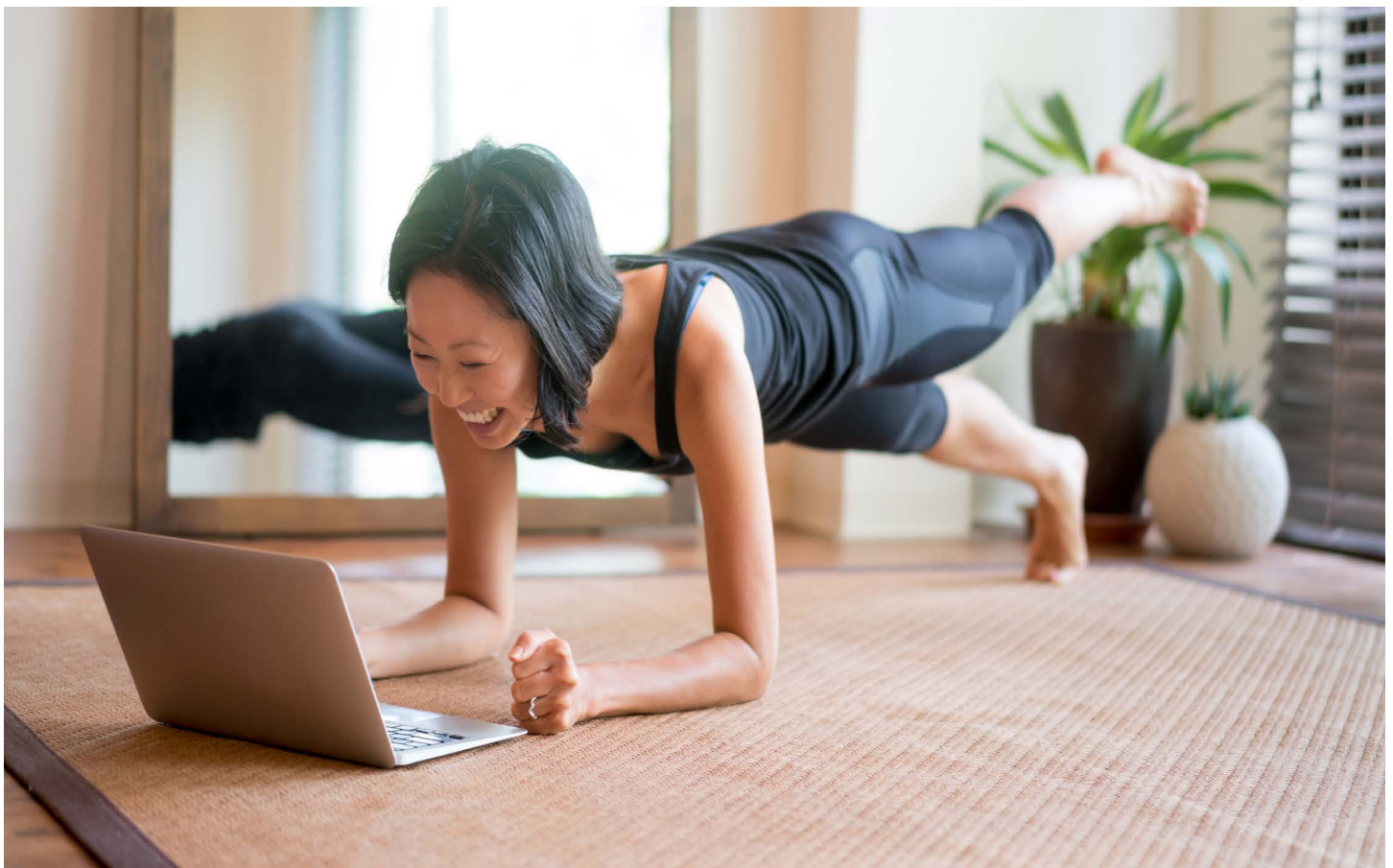
Meaningful data is a crucial aspect of a comprehensive well-being program and helps inform your plan and efforts. By fully understanding the needs of the employee population, you're better able to design a focused program and strategy to resonate and affect change.

Ideas on how to collect useful data:

- Employee engagement surveys
- Employee well-being interest surveys
- Interviews and/or focus groups with employees
- Claims data from your insurance carrier/provider
- EAP, chronic care management, and other program utilization rates
- Wellness program participation and/or satisfaction
- Use of flexible savings accounts (FSAs) or similar health accounts



What data sources can you utilize to help inform your well-being program?



Set goals

A goal is a measurable intended outcome of a program that contributes to the mission and vision of a group/organization. You will likely have several of these that align with various aspects of your wellness program.



Aim to set goals that are SMART: specific, measurable, achievable, relevant, and time-bound.

(Example: *By the end of the fourth quarter, 60% of employees will have engaged with our wellness program through participation in at least one quarterly activity.*)

Goal 1:

Use the following table to organize various components involved in each goal.

Objective	Timeline	Lead	Communication	Evaluation/Outcome	Budget

Example:

Objective	Timeline	Lead	Communication	Evaluation/Outcome	Budget
Increase awareness of added benefits	By Q2	Sally Joe, Wellness Coordinator	Monthly Email	1) Percentage of emails opened 2) Email consistency	N/A

Encourage participation

Participation can often be the biggest challenge to a wellness program, especially when starting out. Shift your view of wellness from short-term successes to long-term, sustainable goals. Be sure to focus on awareness and increasing understanding rather than being caught up in the number of participants.

Involvement can also vary based on the activity type. For instance, a flu shot clinic may involve 60% participation, while a physical activity challenge may engage just a few people. Factors that affect participation include interests, lifestyle, work-home environment, and how the program is implemented.



It's important to emphasize that activities are voluntary and not linked to negative consequences for those who choose not to take part in a wellness activity. Consider offering positive incentives to encourage participation.

There are two types of wellness programs that can be offered: **participatory well-being programs** and **health-contingent well-being programs**.

Participatory programs

Participatory programs are generally available without regard to an individual's health status. In a participatory well-being program, either no reward is offered or none of the conditions for obtaining a reward are based on an individual satisfying a standard related to a health factor. These programs comply with the nondiscrimination requirements as long as the program is made available to all similarly situated individuals. An example of a participatory wellness program would include:

- A program that reimburses employees for all or part of the cost for memberships in a fitness center.
- Offering biometric screenings that provide a reward for participation and do not base any part of the reward on a health outcome.

Health-contingent programs

Health-contingent well-being programs require participants to satisfy a standard related to a health factor in order to obtain a reward. If an employer is planning to implement a health contingent wellness program, there are several factors to consider in order to comply with nondiscrimination rules.



For a full list of requirements on health-contingent programs, check with the **Department of Labor**. Programs that include rewards should be evaluated by in-house counsel to ensure compliance.

Five ideas to increase engagement:

1. Marketing and communications

- Frequent through various channels (such as emails, fliers, and company intranet)
- Create a communication plan for this component, including deliverables, leads, audience, and timeline

2. Incentives and/or motivators

- Target both extrinsic and intrinsic motivators
- Consider what motivates employees, as well as incentives that can offer additional reward and reason for involvement

3. Leadership involvement

- Include mid-manager and C-suite executive support
- Involve your wellness team throughout the process

4. Programming

- Select topics and activities that are most relevant to your employees
- Consider the date, time, location, delivery format, and topic

5. Environmental and organizational policies and procedures

- Assess and outline how you can align with desired outcomes, culture, and behaviors

PILLAR **4**

Evaluation

- Develop an evaluation plan
- Broaden your scope
- Communicate results to stakeholders
- Tell the story

Develop an evaluation plan

Effective program evaluations look at information to learn how well the program is working and whether or not it’s achieving the expected results. Furthermore, the information gained through evaluating your program and identifying needed changes will help you develop a roadmap for a more long-term approach to your wellness programming.

Implement an evaluation process to assess your wellness program and each individual activity to see if objectives have been met. Begin by gathering information on the individual programs or areas of particular focus. As an example, use the table below.

Evaluation Method	Example
Participation, preventive care, or gaps in care	X% of employees participated in the well-being challenge; X% of preventive care or gaps in care at the beginning of the program/campaign verses the end of the program/campaign.
Participant satisfaction	X% of employees indicated they were “highly satisfied” with the program.
Outcome measures	General group biometric measurements and test results
Change in risk factors	High-risk category decreased by X% for diabetes and X% for hypertension.
Improvements in knowledge, attitudes, and behaviors	X% of employees reported that they learned new healthy cooking skills that they will incorporate into their lives, thanks to the lunch-and-learn workshop.
Wellness culture evaluation results	Managers reported that teams exhibit a more positive team culture, and walking meetings are a regular occurrence since starting the steps challenge.
Medical and prescription claims costs	Medical and prescription claims costs decreased by X% as a result of the program.
Productivity/presentism	Managers reported that productivity has increased since starting the physical activity challenge.
Absenteeism	Sick days went from 12 days per year to 8 days per year, on average.
Workers’ compensation	Workers’ compensation claims decreased by X% since implementing the health and safety initiative.

Broaden your scope

When it comes to getting people involved, don't forget to ask nonparticipants what might generate more interest. Gathering varied perspectives helps identify what went well, what fell short, and where the blind spots were. (See sample in **Appendix II**; consider using an online survey tool to help organize and analyze results.)

Outcome measures help you determine if the specific program goals were achieved. For example, for a tobacco cessation program, you'll be able to track how many participants became tobacco-free after six months or a year. Data that reveal unmet goals point to opportunities for change.

Also important to remember: Your health-improvement program is dynamic; it needs to evolve with the needs and interests of your employees. Be willing to allow for changes as you go.

If outcomes fail to meet expectations, it may be because:

- The program wasn't implemented as planned. Perhaps there was limited interest or participation.
- The program goals were unrealistic or overly ambitious, possibly affected by available resources.
- The program's design failed to achieve the desired results. Did it, however, attain something else positive (and unexpected)? For example, a team activity might not have met certain objectives, but it helped boost employee morale because it was considered fun and worthwhile.

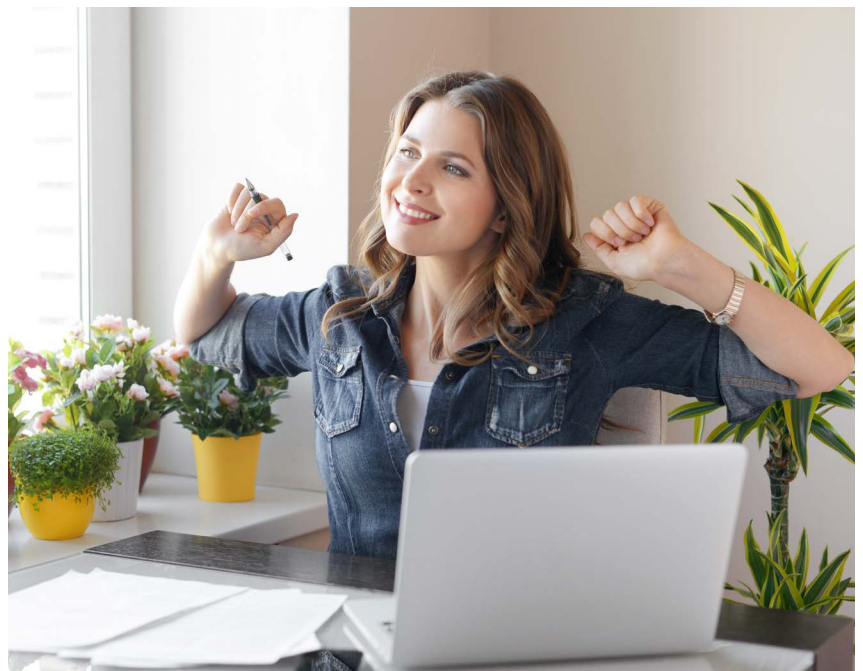


Evaluation can quickly become complicated, but ultimately comes down to a few simple questions:

1. What's working?
2. What's not working?
3. What can we do differently?



Evaluate your well-being program using both quantitative (numbers-based data) and qualitative data (such as written feedback, word of mouth, and observation). Linking evaluation to each goal and objective can help ensure your efforts support the program.



Communicate results to stakeholders

Involving stakeholders in the process is a key part to sustaining and demonstrating the value of your wellness program. See **Appendix II** for insight into how to adapt results of your wellness program into conversations stakeholders will value, understand, and appreciate.



Assess evaluation methods

When assessing your evaluation, consider your methods and additional areas you could report on:

How do your methods relate back to your wellness program areas of emphasis?

How could they be improved?



While evaluations are useful, they're not the end-all-be-all marker of success. Consider showcasing positive outcomes through the stories being told. Whether it's an individual's journey or examples of how the organization has changed, the possibilities to communicate the progress and evolution of your program are open ended.

Rather than limiting a report to metrics, consider any shifts in the culture, highlight personal success stories (while respecting individual privacy and personal health information), and summarize high levels of support and on-the-job anecdotes. Embrace periodic benchmarks as opportunities to create positive momentum. Storytelling is a valuable tool to share and build on your well-being program's success.



Appendix

I: Sample Resources

Sample documents and templated tools available to you include:

- Well-Being Program Evaluation Survey
- Program Evaluation Survey
- Well-Being Program Planning Checklist
- Committee Member Responsibilities & Privacy Agreement

For help or requesting any of the resources above, email us at wellness@pacificsource.com

II: Programs Offered

Extra benefits

As a member of PacificSource, your employer may receive extra benefits, including an online platform, lifestyle, and disease management resources. This varies based on the number of employees, as well as your selections.

Learn more about our extra benefits.

Note: Employers may opt in or out of certain benefits. If you have questions about which ones you have access to, be sure to check with your sales representative for further information.

Wellness consulting

For PacificSource member employer groups with 51+ employees, we offer complimentary wellness consulting through PacificSource. Wellness consultants can help you start, implement, and sustain a comprehensive well-being program for your employees.

More online

For wellness-related policies and procedures:

American Heart Association

heart.org/-/media/healthy-living-files/company-collaboration/healthy-workplace-food-and-beverage-toolkit-pdf.pdf?la=en

Oregon Public Health Institute Worksite Wellness Model Policies

ophi.org/worksite-wellness-model-policies

For performing a culture audit:

Wellness@Work Worksite Assessment Tool

wellnessatworkoregon.org/waws

CDC Workplace Data Collection

<https://www.cdc.gov/workplacehealthpromotion/model/assessment/data-collection.html>

HERO Scorecard

hero-health.org/hero-scorecard

For health-contingent wellness program requirements:

HIPAA and the Affordable Care Act Wellness Program Requirements

dol.gov/sites/dolgov/files/ebsa/about-ebsa/our-activities/resource-center/publications/caghipaaandaca.pdf

For communicating with stakeholders:

CDC Stakeholders Guide

cdc.gov/eval/guide/step1/index.htm