



# Getting Started with Workplace Wellness

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[ProvidenceHealthPlan.com](https://www.ProvidenceHealthPlan.com)

A smiling man with a beard and glasses is talking on a mobile phone. He is wearing a white sweater with dark suspenders. The background shows an office environment with a desk, a laptop, a red megaphone, and various posters on the wall.

# Getting Started with Workplace Wellness

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 that helps 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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# Intro

## Employee well-being matters

Workplace wellness is focused on improving the overall well-being of your employees. Employees spend a lot of 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 health and safety. An effective wellness program can facilitate a cultural change that reaps long-term benefits, ultimately impacting your bottom line.



## Positive workforce impacts

### Reduced absenteeism and increased productivity<sup>1,2</sup>

When employee health and well-being are prioritized in the workplace, they miss fewer days of work, and are typically happier and more productive.

### Engaged employees and improved morale<sup>1</sup>

Fostering a healthy workplace can help you retain high-performing staff. By uniting employees around a common cause and empowering them to participate in 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>

Supporting a healthy workforce reduces healthcare costs, which includes worker's compensation. Less healthy employees, however, tend to incur healthcare costs proportionate to their number of risk factors.

### Improved employee recruitment and retention<sup>1</sup>

Employees are increasingly wanting to work with organizations whose values align with their own, and who are committed to their well-being and quality of life. Also, you may find that business and community affiliates are more interested in partnering with you because of your dedication to workforce wellness.

<sup>1</sup>Workplace Health Model - Centers for Disease Control and Prevention

<sup>2</sup>Total Worker Health: Making the Business Case - The National Institute for Occupational Safety and Health

# Assemble Your Team



## Gain leadership support

Your leadership team's support 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.

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. Look for ways to connect the proposed wellness program to the organization's mission, vision, and goals.



## Organize a wellness committee

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

### Program Coordinator

A program coordinator champions the wellness program and oversees the wellness committee. This may include recruiting committee members and managing their roles and responsibilities, delegating tasks, and organizing events. As you develop your wellness program, keep thorough documentation. This will be useful when evaluating your program or if there is staff turnover. The program coordinator should be a strong, collaborative, and trusted leader who models healthy behaviors.

## Committee Members

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 a natural overlap between them and the wellness committee.

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

- ✔ Diverse ideas and viewpoints from employees across the organization
- ✔ Allocation of workload and tasks to implement wellness initiatives
- ✔ Team building between different departments and levels
- ✔ Additional “wellness champions” that can spread the word about your workplace wellness program

### **When developing your wellness committee, consider:**

- ✔ Representation of the organization
  - Workers from entry-level positions to senior management
  - Employees that might have undisclosed 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?
  - Do they have good relationships within the company?
  - Will they maintain confidentiality?

# Identify

## Determine interests and needs

Your workplace and your employee population are unique – this includes people with different job types and settings such as in the office, in the field, or remote employees – so it's important to develop a program that targets both personal and organizational health goals.

Identify the needs and interests of your population by assessing factors that influence well-being.

- **Employee interests and health risks**

Collect data from an employee interest survey, health assessment, 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 employees' areas of interest and aggregate health risk data from your benefit partners.

**Organizational:** Understand the most prevalent health risks among your population and your organization's current workplace environment to incorporate initiatives that address the most pressing areas to promote a culture of health.

**Community:** Consider the communities in which employees live, work, and play and the impact it has on their well-being. Incorporate programs or benefits that support them both at and away from work.

# Survey your employees



## 01 Employee interest survey

Launch a survey to ask your employees about their concerns and areas of interest. This gives staff an opportunity to offer ideas for what they'd like to see in a wellness program. You can 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 a free platform like Survey Monkey, Google Forms, or Microsoft Forms.

## 02 Health assessment campaign

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

Conduct a health assessment campaign to understand your employees' lifestyle habits, health risks, and readiness to change. Encourage survey or health assessment completion by offering an incentive, such as a gift card or contribution to their health plan premiums.

If more than 25 of your employees complete the assessment you can request an aggregate population health summary report. For confidentiality, this summary excludes personal information.

Since health 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 health assessment campaign, contact your Account Manager or Health Management Consultant.



# Review employee health risk data

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## 03 Biometric screening event\*

A biometric screening provides insight into your employees' health risk factors. It 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 a brief education about it 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.

\*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 or hosting an on-site flu shot clinic.



If you're interested in program reporting, contact your Account Manager or Health Management Consultant for more information.

# Understand organizational and community impacts

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## 05 Organizational survey

When assessing the well-being needs of 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, and access to bike racks or lactation rooms. There are various tools to help you identify strengths and opportunities for improvement, such as:

- **American Heart Association Well-being Works Better Scorecard** – A questionnaire that helps you evaluate your organization’s culture of health and well-being and learn how your company compares to other organizations. Visit: [WellbeingWorksBetter.org](https://www.wellbeingworksbetter.org)
- **HERO Scorecard** – A comprehensive survey that provides an overview as to how your program aligns with industry best practices. Visit: [HERO Scorecard](https://www.hero-scorecard.com)



## 06 Take social determinants of health into account

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 accounts for as much as 40 percent of an individual's health status – which could increase employer healthcare costs and decrease business performance.\*

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 healthcare 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
- Hosting an onsite flu shot clinic
- Creating a private space for telehealth appointments
- Offering backup childcare or eldercare benefits
- Offering healthy food options and filtered water on-site
- Providing a transportation subsidy
- Offering a tuition reimbursement program
- Creating volunteer opportunities
- Offering an onsite gym or access to safe walking paths

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

\*Social Determinants of Health – World Health Organization.

# Design

## Plan your initiatives

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

- Creating a program mission that aligns with your organization's objectives
- Establishing short and long-term SMART goals
- Allocating financial resources
- Addressing all dimensions of well-being with a variety of relevant strategies and interventions
- Creating an annual program calendar that outlines what activities you will offer, when, and how success will be measured

## Develop program mission & 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. When developing a program mission statement, consider the question, "Why does the wellness program exist?" and be sure it also supports your organization's mission.

#### Mission statement examples

- At [Company Name], we are committed to fostering a culture of health and well-being. Our mission is to empower employees to achieve their full potential through comprehensive wellness programs that improve physical, mental, and emotional health.
- At [Company Name], we believe in nurturing a healthy, happy, and productive workforce. Our mission is to provide innovative and effective wellness programs that support the overall well-being of our employees.

### Mission statement examples (continued)

- Dedicated to improving quality of life, our mission at [Company Name] is to create a supportive environment that encourages personal and professional growth through health and wellness initiatives.
- Our mission is to build a healthier workplace by implementing tailored wellness programs that cater to the diverse needs of our employees, helping them to lead balanced and fulfilling lives.



## 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, relevant, and time-based. Check the Appendix for our helpful [SMART Template](#).

### Sample SMART goals

- ✔ Launch an employee survey of well-being 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 an onsite flu shot clinic 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 many 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 to support your wellness program. They may offer onsite speakers, one-on-one sessions, or giveaways – at no cost.

Providence Health Plan offers an online health assessment, wellness challenges, and on-site or virtual presentations. 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 **on-site flu shot clinic** at no cost if participation minimums are met.

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

- Employee compensation/salary
- Vendor partnerships
- Programs and activities
- Incentives and swag
- Professional wellness organizations
- Policy and environmental changes
- Meetings and continuing education
- Program communications

Download our **Budget Considerations handout** in the Appendix for more examples.

# Address all dimensions of well-being

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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 being healthy 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 changes.

**As you design your wellness program, incorporate strategies for all dimensions of well-being:**



## Physical

Physical well-being relates to the ability to maintain a healthy quality of life and seek 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.



## 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.



## 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 your long-term financial goals, and you're prepared to handle stressful financial moments.



## 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 feelings of belonging. You're committed to taking care of and improving your community and you encourage healthy living.



## 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.

Review our **Industry Resources deck** (see page 39) for programs, policies, environmental changes, and benefit 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 include a combination of individual and organizational strategies.

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

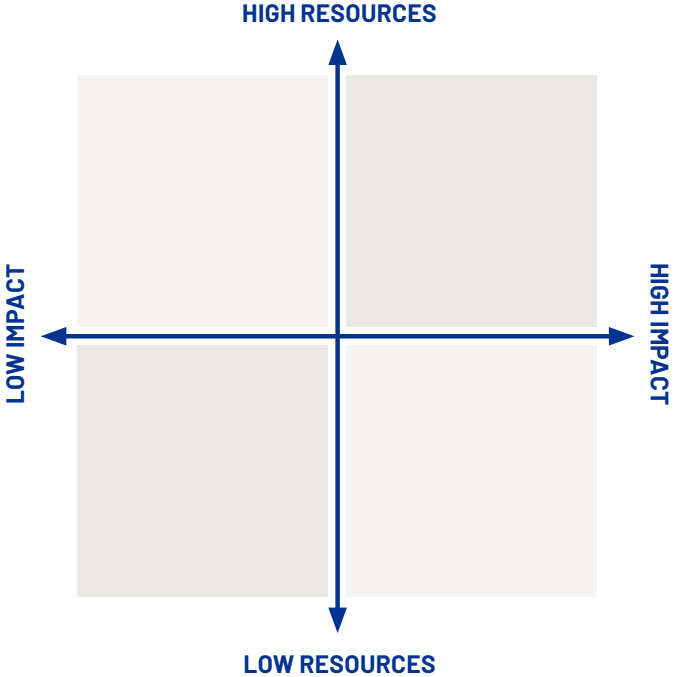
**As you design your well-being program, incorporate a variety of interventions:**

- ✔ Programs
- ✔ Environmental supports
- ✔ Policies
- ✔ 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 on your population.

**Download the Impact Matrix** in the Appendix.



Here are a few examples of each type of intervention\* to get you thinking about what might be relevant for your population.

## Programs

Programs are opportunities available to employees at the workplace or through outside organizations to begin, change, or maintain health behaviors.

- **Physical:** On-site flu shot clinics
- **Mental & Emotional:** Health coaching
- **Financial:** On-site workshops
- **Social & Community:** Donation drive
- **Purpose:** Opportunities for professional development

## Environmental supports

Environmental support refers to modifications of the physical factors at and near the workplace that help protect and enhance employee health.

- **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, are written statements that are designed to protect or promote employee health.

- **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.

- **Physical:** Discounted gym memberships (OnePass Select™)
- **Mental & Emotional:** Providence Health Plan Behavioral Health Suite of Services, Employee Assistance Program (EAP)
- **Financial:** 401(k) contribution, tuition reimbursement program
- **Social & Community:** LifeBalance, child and elder care discounts
- **Purpose:** Leadership development program

\*Centers for Disease Control and Prevention

# Create an annual calendar

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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.

Consider planning activities and events at times when you predict you will have the most participation. You can also align wellness activities with other company events or national health observances.

**A Program Calendar template** is included in the Appendix.

For more ideas, view our **Workplace Well-being Calendar**.



# Engage

## Building a culture of well-being

Participation on its own can be passive. Engagement, on the other hand, delivers value. It creates an environment where your employees return to and trust in your wellness program. An engaged employee actively contributes to building a supportive environment in which people work, live, and play. They engage by choice and appreciate the value that your employee wellness program brings to their overall well-being.

**As you implement your programs, keep your employees engaged by implementing these best practices:**



Effective  
communication



Thoughtful use of  
incentives



Make it fun and  
easy to access



Gain strong  
leadership support



## What is employee engagement?

Wellness program engagement is when your employees are actively involved and invested in their well-being – not simply going through the motions. Asking your employee to change their behavior or invest time in their health can be a challenge. Your employees are more likely to stick to a program if they find it fun, interesting, and relevant to them.

Creating a culture of wellness in the workplace offers numerous business-related advantages. From improved productivity, retention and morale – to a reduction in health risks and healthcare costs – employee engagement is vital to building a culture of well-being throughout all corners of your organization. It's a shared goal where you provide the tools, resources, and support – and each individual has the autonomy to take charge of their own health.

# Build a communications strategy



## Communications Plan

Effective communication is essential to inform your employees about your program, generate buzz, and create 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
- 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



# Incentive strategies



## Determine incentives

As with any type of behavior change – asking your colleagues to actively participate in your workplace wellness program requires time and effort. That’s where an effective incentive strategy comes in. Incentives can be useful in helping motivate and engage employees in developing healthy habits and in driving sustainable behavior change.

Incentivizing your employees to actively participate in your wellness program – varies from organization to organization. An incentive strategy worth its salt should reflect your company’s culture and core values – and be aligned with what typically motivates your employees. For example, if you already use financial incentives to motivate people outside of the wellness program – that might be a good place to begin.

## Rewarding health actions

Offer meaningful incentives that align with your wellness program goals. Consider rewarding health actions that target your risk areas and the behaviors you are trying to change. Everyone has different health goals, so try to incorporate incentives that embrace all aspects of well-being.

### **Incentives may be participation- or outcome-based:**

- **Participation-based:** Employees earn a reward for participating in an activity.
- **Outcome-based:** Employees must reach a set 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 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**
- **WebMD – 7 Steps to Smart Incentive Design**

## 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.

The following resource provides valuable insights:

- **Society of Human Resource Management (SHRM)**
- **Wellness Council of America: Why Wellness Law?**
- **Chittenden Group: Workplace Wellness Programs – Compliance Guide**

# Let's have a little fun

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While you can't make your employees join your wellness program, when your initiatives are engaging and fun, people will be excited to participate.



**While the journey towards better health can be challenging, consider the following strategies to make your programs enjoyable as well.**

- **Gamification**

By incorporating elements such as milestones, challenges, and rewards, gamification taps into our natural inclination to play and compete.

- **Competitions**

Friendly competition is an excellent motivator, and competition fosters stronger teams that connect on a personal level, which often leads to better working relationships.

- **Personalization**

Allow employees to set and measure progress towards their own personal goals. Goal customization ensures no one is intimidated by having to compete with high achievers.

- **Inclusivity**

Wellness program activities should cater to people of all abilities so all employees can participate. Have a reasonable alternative ready if necessary.

- **Community**

Social activities such as team-based challenges inspire teamwork as employees will encourage one another to participate and work together to achieve group goals.

- **Recognition**

Recognition is a powerful way to motivate wellness program engagement – so it's vital to recognize employees and teams. While showcasing teams and individuals that win challenges is natural – you should also recognize people who have made significant strides in their personal well-being.

In the end, ask yourself, "am I having fun?" It seems simple – but as a wellness champion you should also enjoy the program you're participating in. If you're having fun, chances are good that your colleagues are as well.



# Keep it simple

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Another common pitfall for employee wellness programs is they can be overly complicated or time-consuming for employees to participate. The last thing you want to do is make it difficult for employees to participate in your wellness program. Some employees actually prefer to start small – and increase their level of engagement as they feel more comfortable with the program.



## Simplify your program with the following approaches:

- **Have clear program goals**

Limit yourself to a handful of simple goals you can share with your colleagues. If you try and bite off more than you can chew, your program will seem complicated, and people may not want to participate.

- **Limit what to ask of people**

Try not to add hours to the workday. Automate tasks to make participation in the program easy.

- **Plan in advance**

Build out an annual wellness calendar. This affords you time to promote upcoming programs, develop a routine, and ensure nothing is overlooked. It also allows your employees to plan ahead around their own schedules. Check out our **Program Calendar template** in the Appendix and download our **Workplace Well-being Calendar** for monthly health topics and suggestions.

- **Be flexible**

Offer a variety of activities and rewards so employees can choose what they like best.

- **Be supportive along the way**

Arrange meetings with team leaders to discuss their plans for success, and give employees chances to share feedback, ensuring their needs are met.

Some wellness programs start with excitement but get lost in the daily work routine, especially if they are hard to access or use. Keep your colleagues informed and supported to avoid this problem.

# Leadership support

Strong leadership support is essential to wellness program engagement. Leaders serve as role models, so their encouragement should be highly visible at every level of your organization. Leaders should understand the goals of the program, how it will operate, and why it will benefit your organization.

As highly visible members of the organization, leadership can model participation and encourage others to join in. Leaders influence your company's organizational culture and may have a notable impact on your wellness culture once your program is off the ground.



## How leaders can get involved:

- Actively communicate with all staff as to why your organization is focusing on well-being. Use a variety of communication channels to let your employees know about the benefits of participating in your wellness program.
- Sponsor an employee wellness committee. Invite employees with different opinions and ideas – and who are passionate about healthy living.
- Integrate wellness incentives into benefits. Offering lower insurance premiums or time off for wellness program participants can nudge employees to engage.
- Foster a healthy environment by prohibiting tobacco use, allowing breaks for physical activity, adding healthy vending options or holding walking meetings.
- The single most important thing a leader can do is participate in the wellness program. When employees see leaders participate, they are more motivated to do the same.

If your wellness program seems complicated or dull, or lacks support from leadership, ask yourself and your team why. When you're busy managing the program, it's easy to overlook its successes or challenges. Regularly check in on the program and make adjustments as needed.

# 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 recognize the impact on employee well-being, engagement, and satisfaction.

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

### 01 Participation and engagement

Measure how your employees interact with the program. Take note of the types of programs and formats that resonate with them. 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
- External engagement 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:

- Employee interest survey
- Post-event feedback survey

## 03 Health and well-being impact

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

### How to measure it:

#### Physical and mental well-being

- Biometric screening values, e.g. body mass index, blood pressure, total cholesterol, fasting glucose/HbA1c
- Self-reported health risks, e.g. perceived stress and life satisfaction, anxiety [health assessment]
- Chronic conditions prevalence e.g. diabetes, hypertension

#### Health behaviors that impact well-being

- Self-reported behaviors, e.g. physical activity, fruit and veggie consumption, sleep, tobacco, and alcohol use [health assessment]
- Preventive screenings, e.g. wellness visits, flu immunizations [health engagement reporting]

## 04 Organizational Impact

Creating a culture of health requires 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 behavior. 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

- Employee survey
- Leadership scorecard

#### Rewards and recognition

- American Heart Association
- Healthiest Employers
- C. Everett Koop

## 05 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

## 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 healthcare cost trends and other financial outcomes\*.

### 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

\*Health Enhancement Research Organization (HERO)



# Program Results

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Using a variety of data collection methods can help give you a better overall picture of your program's results. While having a variety of methods is useful, 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 – identify, design, engage, assess – along with the 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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# Employee Interest Survey

Making healthy choices feels great, but isn't always easy. Whatever health means to you, we want to help you get there. That's why we're starting a wellness program at [ORGANIZATION]. Complete this short survey and tell us what 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"/> Family well-being or parenting   |
| <input type="checkbox"/> Career development  | <input type="checkbox"/> Caregiving or 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"/> Smartphone/mobile app                           | <input type="checkbox"/> Team meetings          |
| <input type="checkbox"/> In-person class during the workday              | <input type="checkbox"/> Healthy habit tracking |
| <input type="checkbox"/> Lunch and learn workshops                       | <input type="checkbox"/> Other – tell us!       |
| <input type="checkbox"/> Health improvement competitions/team challenges |   |

## 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?

- |   |   |
|---|---|
| <input type="checkbox"/> Announcements at team/company meetings | <input type="checkbox"/> Flyers and handouts in common spaces |
| <input type="checkbox"/> Email                                  | <input type="checkbox"/> Newsletters                          |
| <input type="checkbox"/> Company website/intranet               | <input type="checkbox"/> Mail to your home                    |
|   | <input type="checkbox"/> 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!

**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 acceptable for people to participate in physical activity 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?**

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

---

NAME

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EMAIL ADDRESS / PHONE NUMBER

# Wellness Program Strategy

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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 various dimensions of well-being.

## Organization Mission

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## Wellness Program Mission

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## Wellness Program Objective

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## Opportunities

Well-being Dimension	Interest (survey data, health 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

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

Well-being Dimension	SMART Goal	Evaluation Method(s)
<b>Short Term Goals</b>		
<b>Long-Term Goals</b>		

# Action Plan

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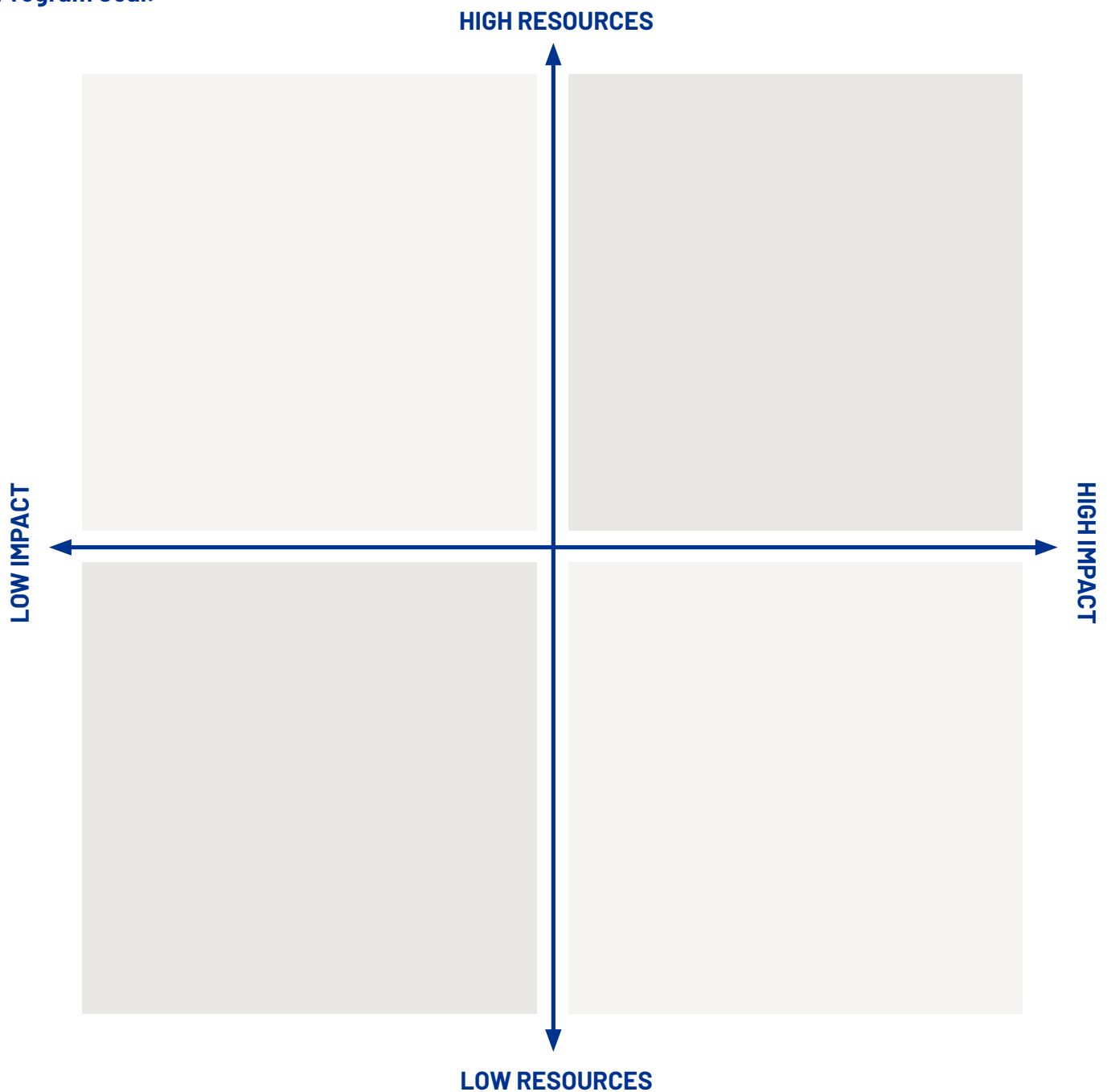
After you've analyzed your data and written program goals, outline a roadmap for the future. Identify specific activities, policies, or resources you will use to reach your goal. Lastly, outline methods for evaluating the success of your initiatives.

<b>SMART Goal</b>			
<b>Program &amp; Activities</b>			
<b>Policies &amp; Environmental Changes</b>			
<b>Benefit Tools &amp; Resources</b>			
<b>Evaluation Method(s)</b>			
<b>Baseline Measure</b>			
<b>Actual Result</b>			

# 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 on your population. Think about your program goals, 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 you will host each activity or implement new policies and consider what communications are required. Include your incentive strategy and participation goals when appropriate.

	01	02	03	04
Program & Activities				
Policies & Environmental Changes				
Communication Strategies				
<b>Complete the section below as applicable</b>				
Incentive				
Eligibility				
Participation Goal				
Actual Participation				

# Budget Considerations

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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 you may need to consider in your program budget.



## Salary / Wages

- Wellness Program Coordinator



## Partnerships

- Fitness classes – yoga, boot camp
- Health education presentations – nutrition, sleep, emotional/mental well-being, financial health, etc.
- Activity devices
- Community supported agriculture partnership/healthy food subsidies
- App subscriptions
- Annual transit passes/subsidies for active commuters



## Programs and Activities

- Health fair
- Wellness day
- Community 5k



## Memberships

- Professional wellness organizations
- Local wellness organizations

- Weight management program
- Alternative care – on-site 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



## Incentives

- Giveaways
- Health plan incentives
- Social events



## 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 on-site clinic
- Walking trails
- Ergonomic desks or treadmill desks
- Stairwell redesign
- On-site 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 wellbeing, engage in the organization’s wellness program, and begin behavior changes.

## Incentives may be participation-based or outcome-based:

- **Participation-based:** Employees earn a reward for participating in an activity.
- **Outcome-based:** Employees must reach a set standard to receive the reward.



### Social

- Recognition (at team or organization-wide event)
- Wellness Champion designation
- Lunch with leadership
- On-site 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
- Health Reimbursement Arrangement (HRA) or Health Savings Account (HSA) contribution
- Premium reduction
- Tobacco-free discount

# Wellness Industry Resources

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## 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
- Medline Plus (National Institute of Health)
- My Health Finder (US Department of Health and Human Services)

## 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
- 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



# Want to learn more?

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## Download resources from these reputable organizations:

Providence Health Plan Workplace Wellness

[ProvidenceHealthPlan.com/Employers/Workplace-Wellbeing-Resources-and-Toolkits](https://www.providencehealthplan.com/Employers/Workplace-Wellbeing-Resources-and-Toolkits)

Centers for Disease Control and Prevention

[CDC.gov/Workplace-Health-Promotion/PHP/index.html](https://www.cdc.gov/Workplace-Health-Promotion/PHP/index.html)

Healthy Living, American Heart Association

[Heart.org/en/Healthy-Living](https://www.heart.org/en/Healthy-Living)

Well-being Works Better, American Heart Association

[WellbeingWorksBetter.org/EN](https://www.wellbeingworksbetter.org/EN)

Business Group on Health

[BusinessGroupHealth.org/en/Topics/Well-Being-and-Workforce-Strategy](https://www.businessgrouphealth.org/en/Topics/Well-Being-and-Workforce-Strategy)

Society for Human Resource Management

[SHRM.org/Topics-Tools/Tools/Toolkits/Designing-Managing-Wellness-Programs](https://www.shrm.org/Topics-Tools/Tools/Toolkits/Designing-Managing-Wellness-Programs)

Health Enhancement Research Organization

[Hero-Health.org/Resources/All-Resources/](https://www.hero-health.org/Resources/All-Resources/)



# Health For All

We are committed to working alongside the communities we serve, learning about unique healthcare challenges, and creating tangible solutions to make healthcare more equitable and accessible.

For questions about your well-being program, contact  
[WorkplaceWellness@providence.org](mailto:WorkplaceWellness@providence.org)

[ProvidenceHealthPlan.com](https://ProvidenceHealthPlan.com)