

WELCOA's Seven Benchmarks: Overview & Introduction

Ryan Picarella, MS and Sara Martin Rauch, MS



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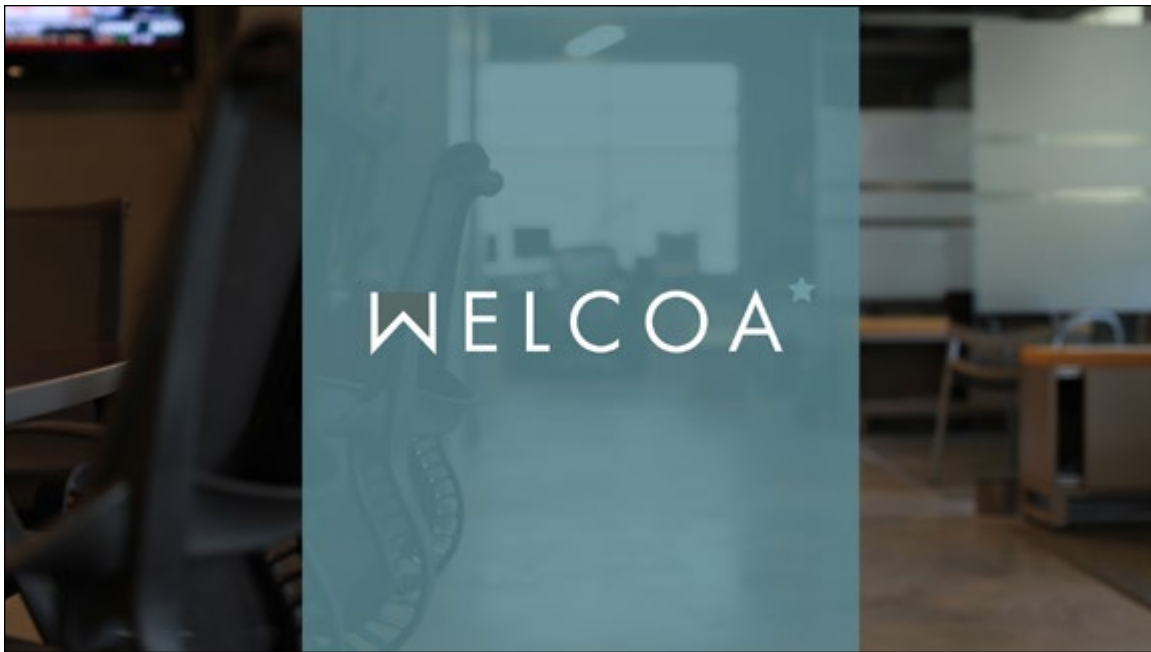
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WELCOA'S SEVEN BENCHMARKS

In This Training...

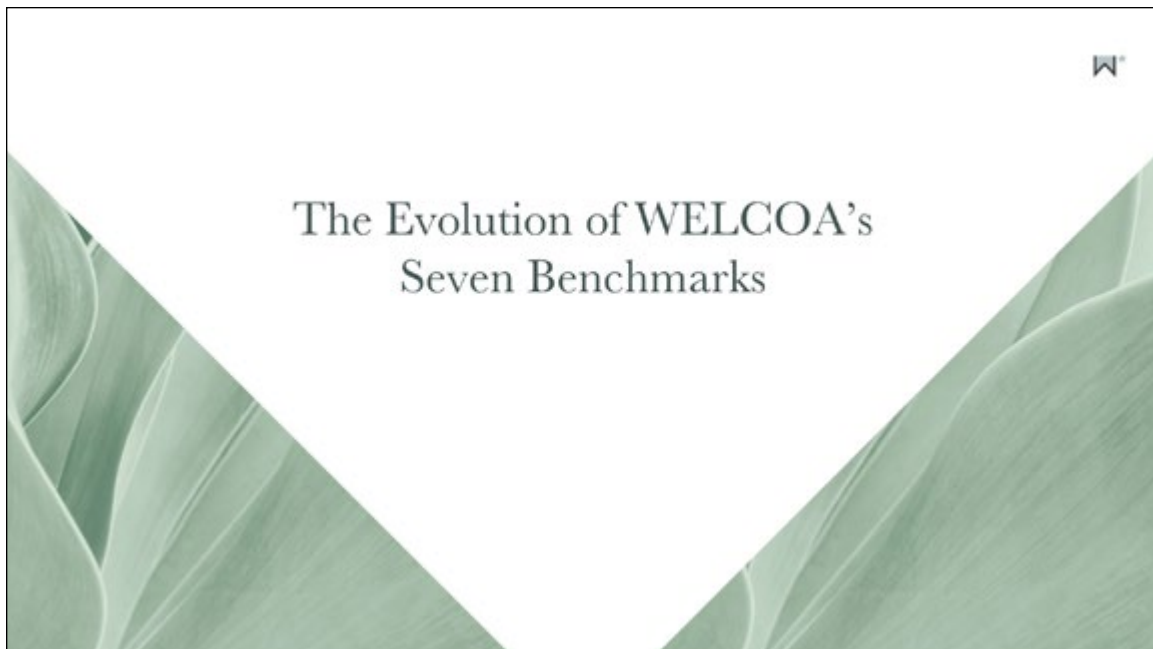
- The Evolution of WELCOA's Seven Benchmarks
- The Seven Benchmarks approach to creating meaningful and engaging wellness initiatives
- Communicate your organization's wellness value story
- First look at the updated Well Workplace Checklist



The logo features a large grey number '7' in the center. Above the '7' is the word 'WELCOA' with a star, and below it is the word 'BENCHMARKS' in a dark banner. The '7' and text are surrounded by seven curved arrows in various colors (teal, orange, brown, green, yellow, blue, grey) that form a circular path.

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The Evolution of WELCOA's
Seven Benchmarks



The slide features a background of large, overlapping green leaves. The title is centered in a serif font. A small WELCOA logo is in the top right corner.

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WHERE WE'VE COME FROM

Original Seven Benchmarks

- BENCHMARK 1**
FAST: Capturing Senior Level Support
- BENCHMARK 2**
FAST: Creating Cohesive Wellness Teams
- BENCHMARK 3**
FAST: Collecting Data to Drive Results-Oriented Wellness Initiative
- BENCHMARK 4**
FAST: Crafting an Annual Operating Plan
- BENCHMARK 5**
FAST: Choosing Appropriate Health Promotion Interventions
- BENCHMARK 6**
FAST: Creating a Supportive Health Promoting Environment
- BENCHMARK 7**
FAST: Carefully Evaluating Outcomes

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Why We Need an Evolved Value Story

Workplace Wellness Programs Are a Sham
They're a waste of time and money, they don't improve health outcomes, and they're a front for shifting costs onto employees.
By L.K. Anderson

Why Your Workplace Wellness Program Isn't Working
by Ed O'Keefe and Jon Foster
Many things will not happen if you offer no guarantee of meaningful personal well-being for companies that provide these programs, it's time to rethink.
Catalytic research shows a clear link between employee engagement and well-being, with managers serving as a conduit between the two.
These days, doctors aren't the only ones interested in well-being. Series, pharmaceuticals, grocery, and other businesses are restructuring programs designed to enhance their customer metrics. But of all the places you go each day, your workplace may have the greatest influence on your well-being. And the person who can best help you achieve results is

The Upshot
Do Workplace Wellness Programs Work? Usually Not
The New Health Care
A Health Care and Wellness Weekly

The Dark Side Of Corporate Wellness Programs
It can feel counter-intuitive, but all these step-by-step initiatives and single-line fitness can be doing more harm than good.

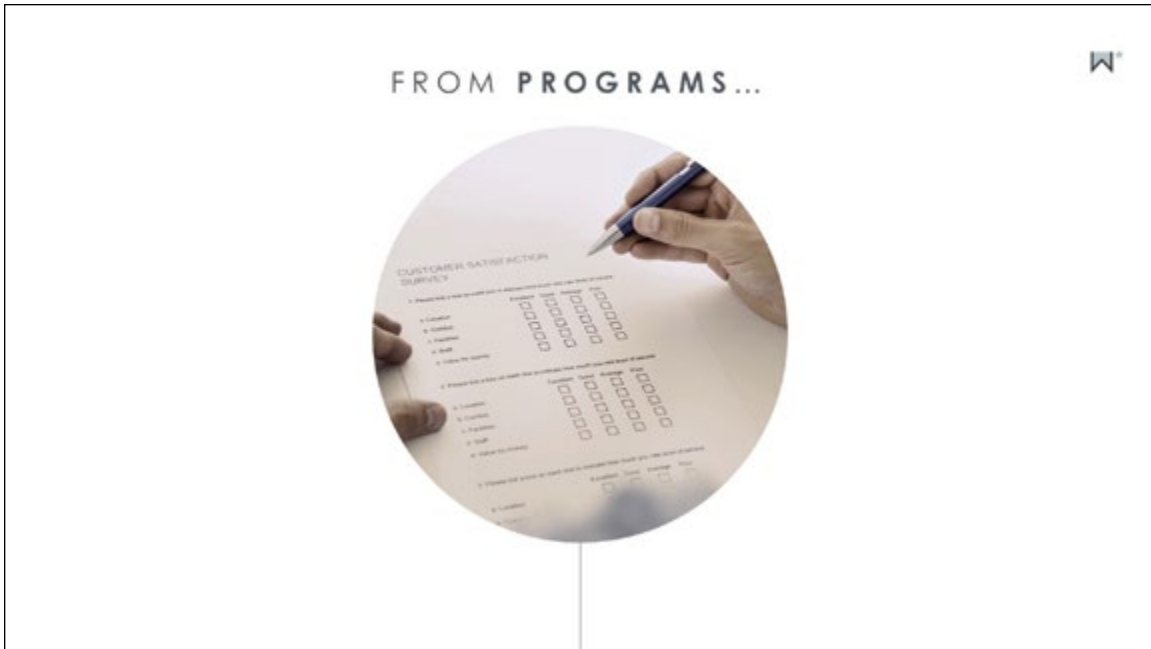
MOST INNOVATIVE COMPANIES 2018
Health & Wellness

RELATED STORIES
1. Innovation: How to Build a High-Performing Team
2. Innovation: How to Build a High-Performing Team
3. Innovation: How to Build a High-Performing Team

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W

WELCOA'S SEVEN BENCHMARKS

Advisory Council


Since April of 2015, we've been putting our heads together with some of the best and brightest in the industry.

- Focus groups with Well Workplace Award winners
- Researchers from the University of North Carolina at Greensboro
- Influencers from the Human Resources Institute, Best Places to Work, Edington Associates and Kaiser Permanente.

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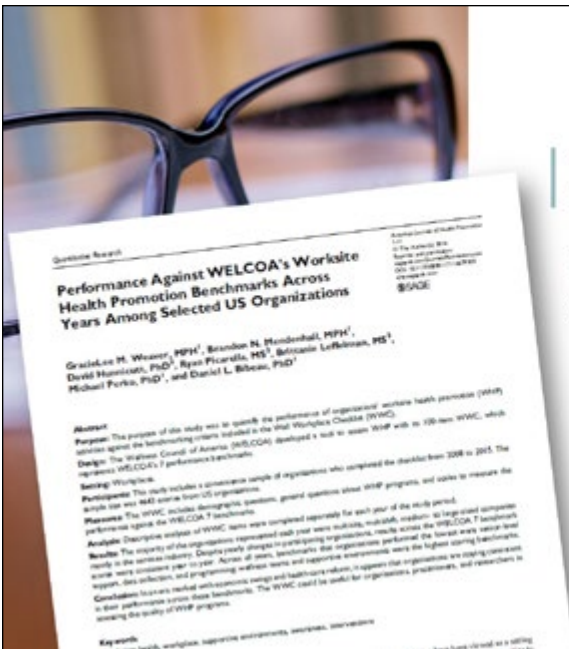
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WELCOA'S SEVEN BENCHMARKS
Published Research

- Analyzed data from over 4,000 organizations between 2008-2015
- Biggest challenges for organizations:
 - Senior-level support
 - Data collection
 - Choosing appropriate interventions

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WELCOA'S SEVEN BENCHMARKS
Published Research

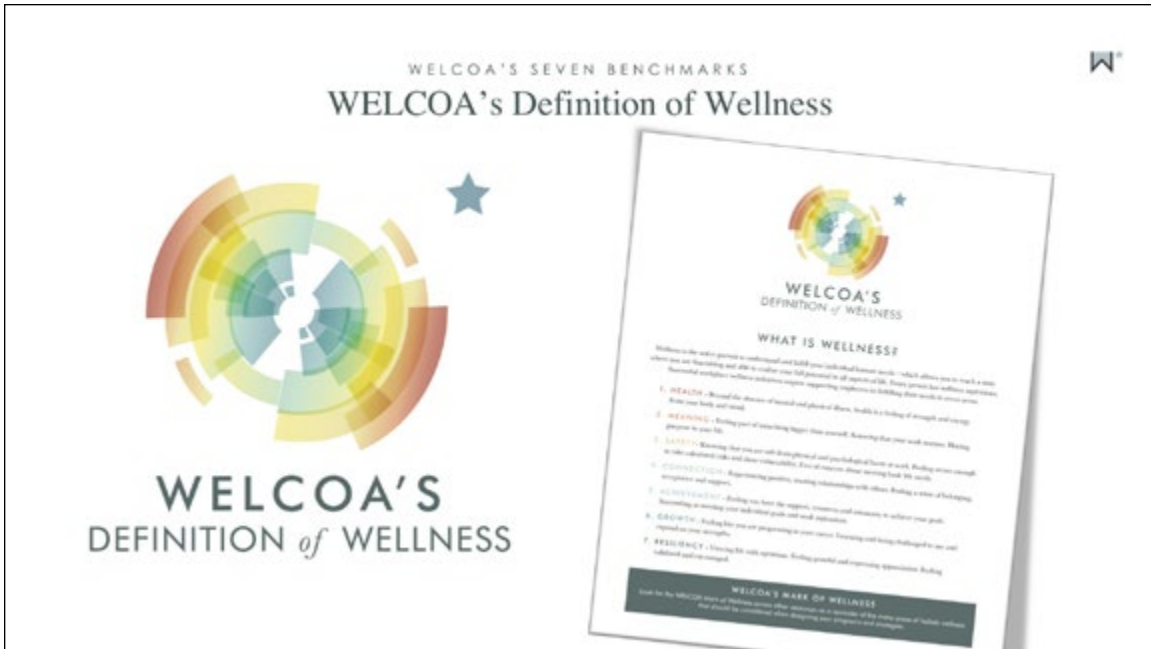
Reasons for starting wellness initiatives are evolving

- Slight upward trend among respondents indicating “to improve morale” and “to attract and retain employees”
- Slight decrease in the number of organizations indicating “to contain costs”

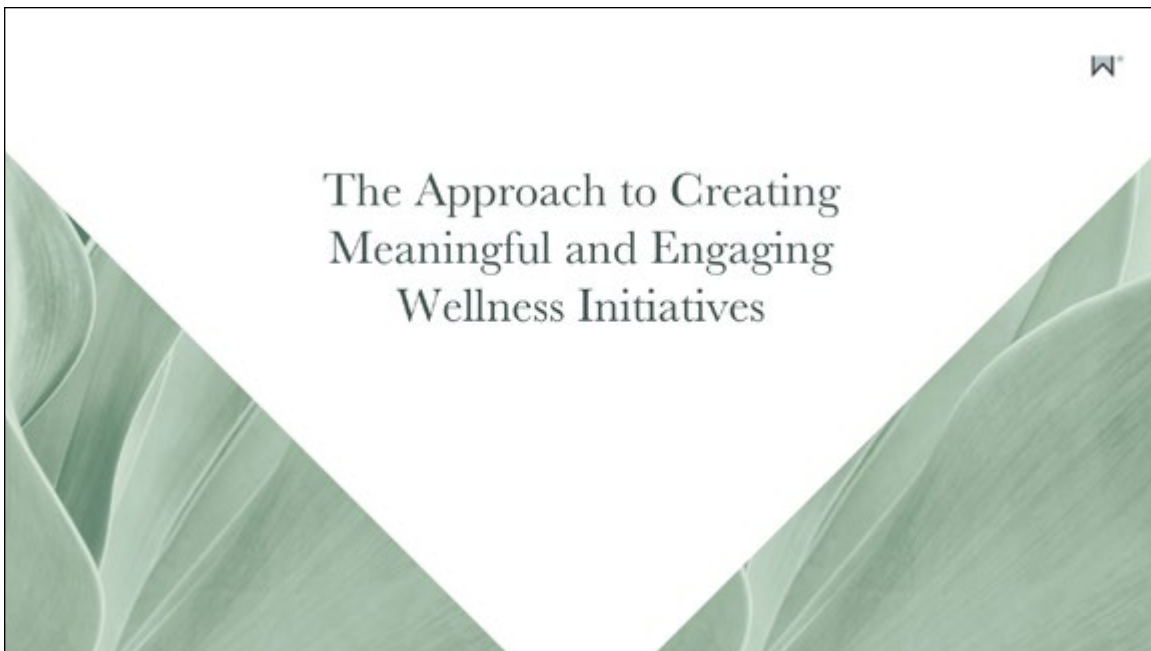
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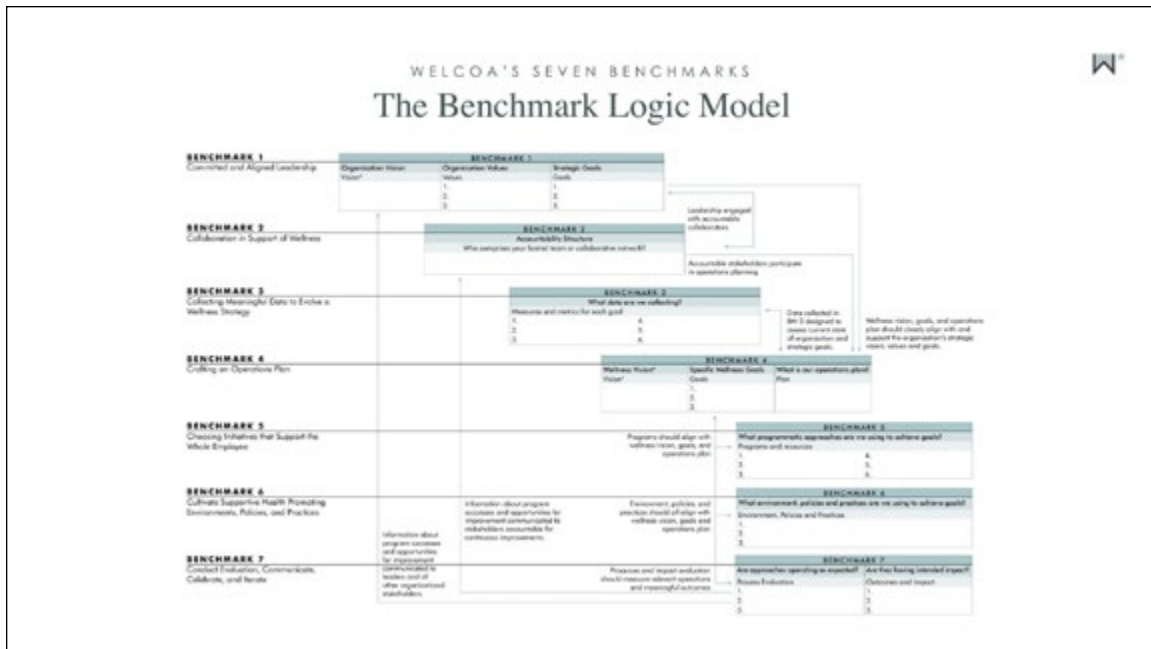
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WELCOA'S SEVEN BENCHMARKS W*

Why the Seven Benchmarks Approach?

Which of these approaches sounds most like your program?

- Activity Centered: The “more must be better” approach
- Results-Oriented: You have planned strategically to achieve an intended result



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WELCOA'S SEVEN BENCHMARKS W*

The Problem with Activity-Centered Programs

Can't answer important questions:

- What are we trying to achieve?
- How does our wellness strategy fit into bottom line goals for our organization?
- What do I measure to figure out if I was successful?
- What is the value story for our wellness initiative?



A large, light blue question mark is positioned to the right of the text, centered vertically with the list of questions.

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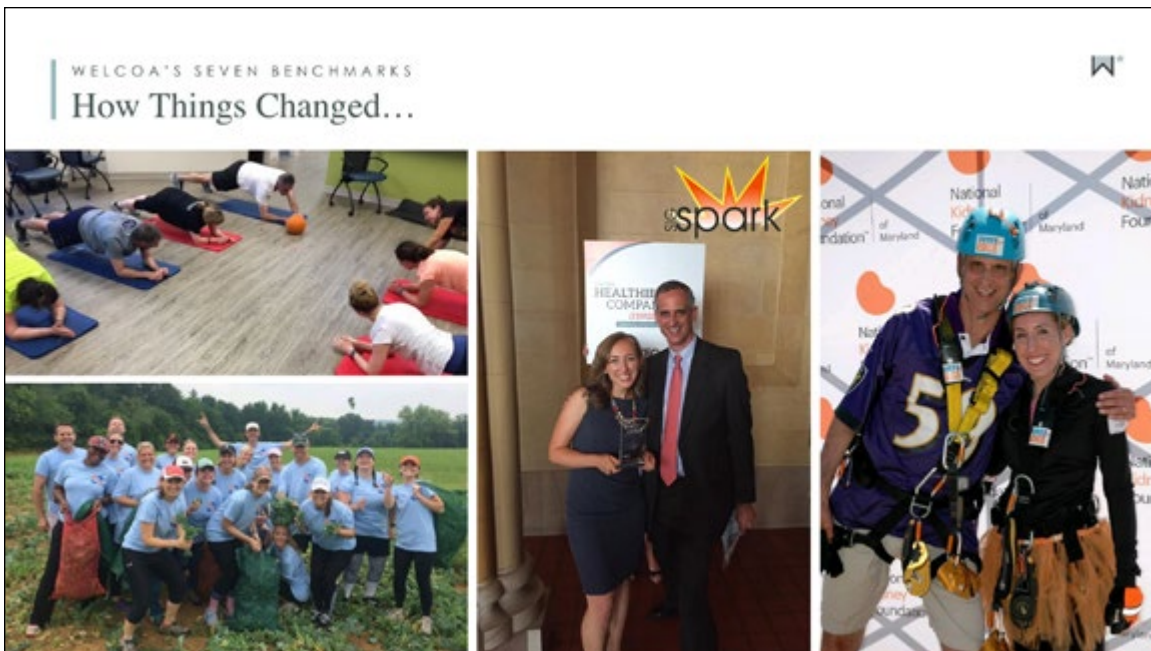
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WELCOA'S SEVEN BENCHMARKS

The Results-Oriented Approach

Creating aligned, meaningful wellness initiatives

- Ensure leadership understands the value of wellness to the organization (Benchmark 1)
- Protect your program from silos (Benchmark 2)
- Understand the needs of your population and how you are currently doing at achieving organization's goals (Benchmark 3)
- Create a strategic plan that will ensure success (Benchmark 4)

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BENCHMARK 1


Committed and Aligned Leadership



AN IDEAL APPROACH TO LEADING FOR WELLNESS IS...


- » **Inclusive and aligned** – Stakeholders throughout the organization play important leadership roles.
- » **Strategic** – Health and wellness is embodied in the organization's vision and mission.
- » **Systemic** – Leaders at all levels consider the health and wellness impact of everything they do.
- » **Caring and Compassionate** – Leaders at all levels support employee health and wellness not just because it makes good business sense, but because they genuinely care.

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BENCHMARK 1

Committed and Aligned Leadership



GETTING TACTICAL:

- » Align your organization's vision and values with employee wellness.
- » Create a wellness vision statement that is separate from your organization-level vision and values—but is communicated to employees by leadership.
- » Position the wellness strategy as a way to achieve the larger vision of the organization
- » Build wellness into standardized ("non-wellness") management and leadership training
- » Consider building wellness of employees into performance goals of leaders/managers

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BENCHMARK 1
Committed and Aligned Leadership

WELCOA'S
BENCHMARK 1 TOOLKIT

- » Quick Guide: Capturing Leadership Support
- » 5 Questions to Ask Leadership
- » Profile of a Supportive Leader
- » Recommended Reading List for Leaders
- » Wellness Leadership Survey

WELCOA'S 34 MUST-READS FOR WELLNESS LEADERS
A compilation of articles for leading high performing, happier, healthier organizations

6 STEPS FOR CAPTURING LEADERSHIP: CRITICAL QUESTIONS FOR SUCCESS

WELCOA'S 5 QUESTIONS TO ASK LEADERSHIP

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BENCHMARK 2
Collaboration in Support of Wellness

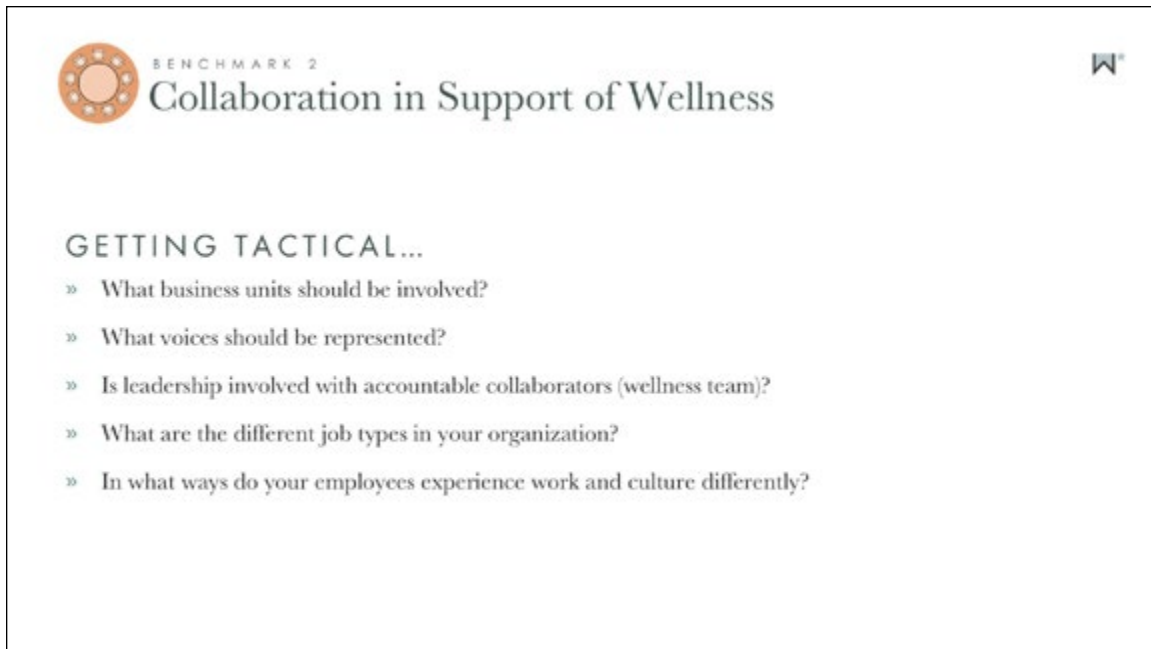
AN IDEAL APPROACH TO COLLABORATING IN SUPPORT OF WELLNESS IS...

- » **Inclusive** – All employee and stakeholder groups from throughout the organization are involved in planning and executing the organization's approach to wellness.
- » **Collaborative and cooperative** – There is a team (either formal or informal) of cross-functional stakeholders who collaborate and coordinate in support of employee wellness.
- » **Empowered** – The people responsible for wellness are empowered and funded.

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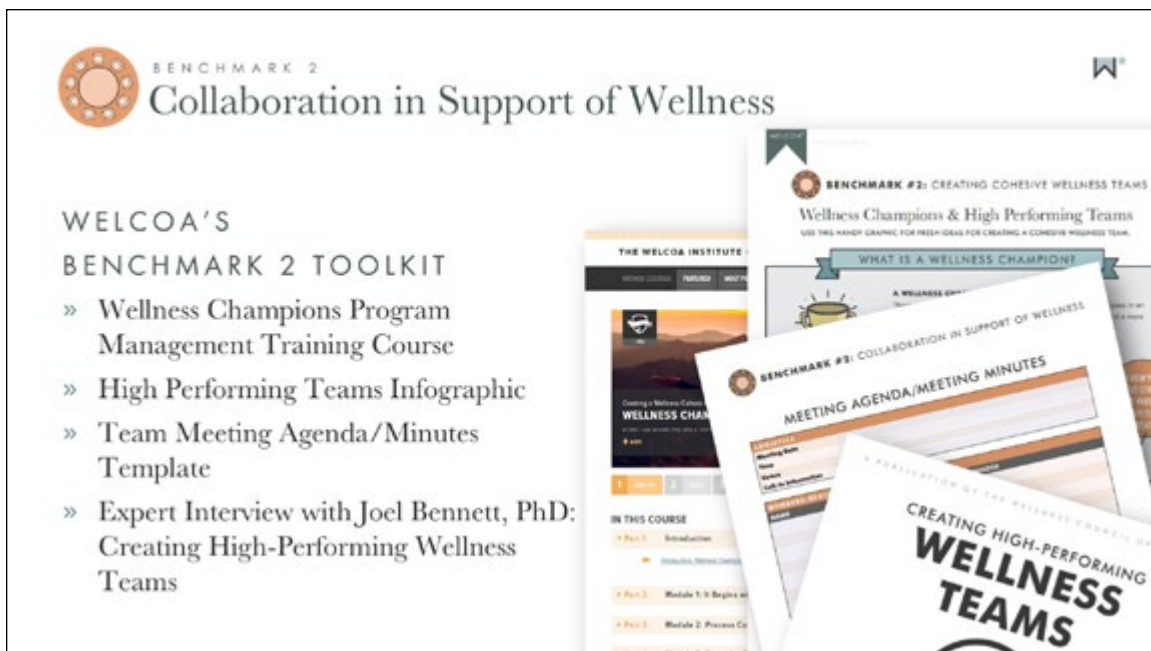


BENCHMARK 2
Collaboration in Support of Wellness

GETTING TACTICAL...

- » What business units should be involved?
- » What voices should be represented?
- » Is leadership involved with accountable collaborators (wellness team)?
- » What are the different job types in your organization?
- » In what ways do your employees experience work and culture differently?

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BENCHMARK 2
Collaboration in Support of Wellness


WELCOA'S BENCHMARK 2 TOOLKIT

- » Wellness Champions Program Management Training Course
- » High Performing Teams Infographic
- » Team Meeting Agenda/Minutes Template
- » Expert Interview with Joel Bennett, PhD: Creating High-Performing Wellness Teams

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BENCHMARK 3


Collecting Meaningful Data to Evolve a Wellness Strategy

Note: This benchmark is designed to help you understand your employee population, uncover what matters to the people in your organization, assess the current state of your organization, and inform your wellness vision and goals. It addresses how you collect and safeguard data, and how you use what you learn to shape your efforts to support health and wellness.

AN IDEAL APPROACH TO COLLECTING DATA IS...

- » **Meaningful** – Measures matter. Meaningful measures are used to guide relevant strategy and initiatives.
- » **Respectful** – Respect for privacy and confidentiality is paramount.
- » **Representative** – Employee perspectives and needs are actively addressed in the organization's approach to wellness.

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BENCHMARK 3

Collecting Meaningful Data to Evolve a Wellness Strategy

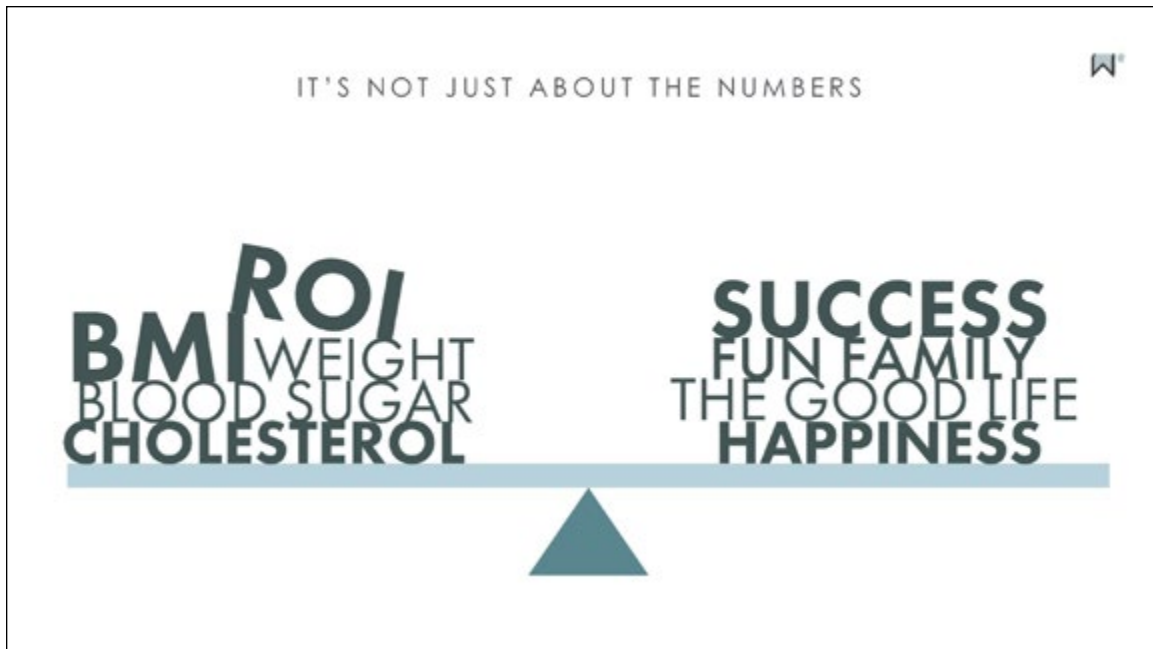
GETTING TACTICAL...

- » Data collected to fulfill this benchmark should assess current state of organization's strategic goals ("How are we currently doing?")
- » Data collected to fulfill this benchmark should assess all areas of employees' wellness in the current state:
 - Physical health
 - Emotional health
 - Mental health
 - Sense of meaning/purpose/personal values
 - Financial wellness
 - Perceived safety (physical and psychological)
 - Perceived ability to grow professionally within the organization

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BENCHMARK 4


Crafting an Operating Plan



AN IDEAL APPROACH TO OPERATIONS PLANNING IS...


- » **Inclusive** – All relevant internal employee groups and external stakeholder groups are involved in operations planning.
- » **Strategic** – The operations plan reflects the vision, values and purpose of wellness in the organization that was outlined in Benchmark #1.
- » **Accountable** – The operations plan outlines accountability for specific goals and tasks.

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BENCHMARK 4

Crafting an Operating Plan



GETTING TACTICAL...

- » Start with writing your wellness vision based on how you think wellness is positioned to achieve broader organizational goals and what you know your employees want and need.
- » Write SMART goals for one year of planning to take steps toward achieving your vision.
- » What initiatives will help you achieve your goals?
- » Who will be responsible for implementing your initiatives?
- » How will you know if you were successful?

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BENCHMARK 4
Crafting an Operating Plan

WELCOA'S
BENCHMARK 4 TOOLKIT

- » Fillable Operating Plan Template
- » Fillable Operating Plan Presentation
- » Training Course: *A Fresh Take on Benefits Integration*
- » Quick Guide: *10 Things to Consider When Developing Your Operating Plan*

Budget Item	Year 1 Proposed
Incentives	\$
Staffing	\$
Communication Materials	\$
Educational Materials	\$
Vendor	\$

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BENCHMARK 5
Choosing Initiatives that Support the Whole Employee

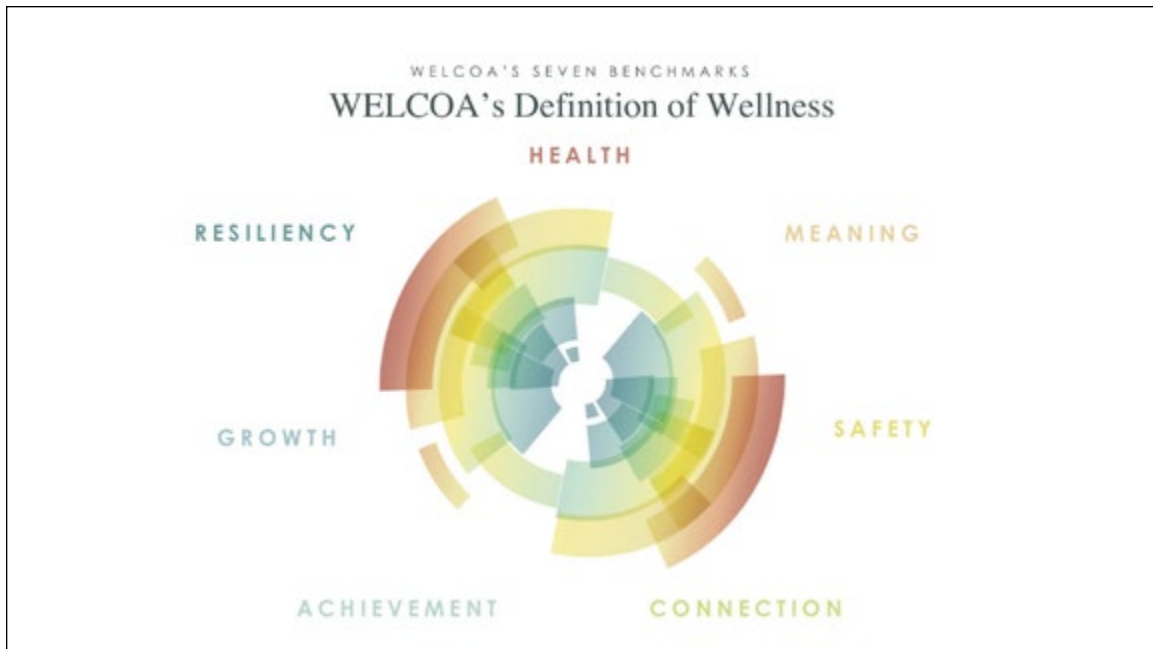
AN IDEAL APPROACH TO INITIATIVES THAT SUPPORT WELLNESS IS...

- » **Strategic** – An organization's strategy for supporting employee wellness is grounded in its core vision and purpose and guides everything it does.
- » **Comprehensive** – Wellness resources help employees across the health continuum live healthy and thriving lives (beyond the absence of risk and illness).
- » **Goal-supportive** – Wellness operates under the core belief that people are motivated to improve their wellness. Initiatives are designed to help employees succeed at what they want to achieve.
- » **Need-supportive** –
 - Wellness approaches support basic human needs of autonomy, relatedness, and competence.
 - Wellness approaches are designed to build connections, strengthen relationships, and reinforce team collaboration.


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 BENCHMARK 5

Choosing Initiatives that Support the Whole Employee

GETTING TACTICAL...

- » What programmatic approaches are we going to use to achieve our goals?
- » Do the programs we roll out align with what we said our vision for wellness is?
- » Do our programs support the whole employee in all aspects of wellness?
 - Physical health
 - Emotional health
 - Mental health
 - Sense of meaning/purpose/personal values
 - Financial wellness
 - Perceived safety (physical and psychological)
 - Perceived ability to grow professionally within the organization

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BENCHMARK 5
Choosing Initiatives that Support the Whole Employee

WELCOA'S
BENCHMARK 5 TOOLKIT

- » Planning Template: *Choosing Appropriate Interventions*
- » Quick Guide: *Creating Sustainable Habit Change*
- » Tons of intervention ideas, case studies and expert interviews

Considerations When Choosing the Right Interventions T
WELCOA and MHA at Work have conducted a series of comprehensive study
Choosing appropriate initiatives will have interventions:

1. What
2. EATING THE MAYO PR FOR GOOD

THE INTERVENTION AT A GLANCE

COMPANY: Carolina Healthcare System, Raleigh, NC
PROGRAM NAME: Plant Forward
CREATOR: Tracy Sells, MS, Executive Wellness Manager
Anthony Oliver, MS, Director of

Habits take place within Four Conte

SYSTEMS SPACES SOCIAL

WHAT IS A CONTEXT?
A context is broadly defined as "the group of conditions that exist where and when something happens."
Essential to the intervention is which you're with, including physical and social surroundings.
Interventions are designed to be context-specific.

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BENCHMARK 6
Cultivate Supportive Health Promoting Environments,
Policies, and Practices



AN IDEAL APPROACH TO CREATING A SUPPORTIVE ENVIRONMENT
FOR WELLNESS IS...

- » **Strategic** – The organization's strategy for creating a supportive environment and culture is grounded in the core vision and purpose of the organization.
- » **Positive** – Wellness approaches focus on building a positive future built on current points of strength.
- » **Integrated** – Core approaches for supporting wellness are integrated across all organizational functions and departments.
- » **Need-supportive** –
 - Physical health
 - Work environments support basic human needs of autonomy, relatedness, and competence.
 - Work environments are designed to build connections, strengthen relationships, and reinforce team collaboration.

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 **BENCHMARK 6** 

Cultivate Supportive Health Promoting Environments, Policies, and Practices

GETTING TACTICAL...

- » Increasing physical activity
- » Reducing tobacco use
- » Promoting better nutrition
- » Improving workstation ergonomics
- » Integrating safety and emergency policies or task forces
- » Actively addressing issues of mental health and substance abuse
- » Managing and reducing job-related stress
- » Increasing participation in provided wellness resources among all employees regardless of job type
- » Maintaining organizational benefits that promote good health among all employees

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 **BENCHMARK 6** 

Cultivate Supportive Health Promoting Environments, Policies, and Practices

ENVIRONMENTAL ENGINEERING

- » **Casinos** are brilliantly designed from an environmental perspective... Few settings can manipulate the human mind as successfully as these places.
- » Every day in the U.S., slot machines alone take in more than **\$1 billion** in wagers.



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BENCHMARK 6

Cultivate Supportive Health Promoting Environments, Policies, and Practices

5 AREAS TO CONSIDER

- 1. Environment, Policies & Practices**
 - a. The built environment (WELL Building Standard, FitWell, etc.)
 - b. Worksite and workstation conditions are designed to support more physical activity
 - c. Access to healthy food
 - d. Access to private spaces
- 2. Employee Benefits**
- 3. Organizational culture incorporates multiple touchpoints for wellness**
 - a. Communication systems
 - b. Traditions & symbols
 - c. Training integrates health and wellness
 - d. Recognition programs and models for pro-wellness behaviors (vs. overwork, etc.)
- 4. Supportive social atmosphere/opportunities for connectivity**
- 5. Sustainable and socially responsible business practices**

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BENCHMARK 6

Cultivate Supportive Health Promoting Environments, Policies, and Practices

WELCOA'S BENCHMARK 6 TOOLKIT

- » Planning Template
- » Sample Wellness Policies
- » 5 Practices to Consider in Creating Supportive Environments
- » Expert Interviews & Trainings: *Creating Shared Values for Positive Organizational Health* with Dee Edington, PhD & Jennifer Pitts, PhD

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BENCHMARK 7
Conduct Evaluation, Communicate, Celebrate, and Iterate

Note: This benchmark is designed to help you understand the impact of your efforts to support health and well-being. It also reflects how findings from our evaluation are communicated and how they inform continuous improvement efforts in your organization.

AN IDEAL APPROACH TO IMPROVING WELLNESS APPROACHES IS...

- » **Strategic** – The organization has meaningful measures and objective success criteria that reflect the stated goals of the organization (strategic priorities outlined in Benchmark 1) and specific approaches for supporting health and well-being (initiatives, resources, services described in Benchmarks 4, 5 & 6).
- » **Generative** – Metrics and findings are used to give rise to new and innovative ideas or possibilities that will serve the greater good.
- » **Comprehensive** – The full value of our investment in the health and well-being of employees (i.e., value to employees and value to the organization) is frequently evaluated.

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BENCHMARK 7
Conduct Evaluation, Communicate, Celebrate, and Iterate

WELCOA'S BENCHMARK 7 TOOLKIT

- » Certification Course by Jessica Grossmeier, PhD, MPH: *Wellness Program Evaluation Best Practices*
- » Evaluation Planning Template
- » Sample Participation Feedback Form for data collection
- » Sample Annual Worksite Wellness Summary for communicating program successes



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WELCOA's Seven Benchmarks: Overview & Introduction

Ryan Picarella, MS and Sara Martin Rauch, MS



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WELL WORKPLACE PROCESS

Checklist

- » 150-item Organization-facing assessment
- » Measures extent to which an organization is following WELCOA's 7 Benchmarks
- » Customized reporting with recommendations/links to WELCOA Resources

Benchmark	Score	Target
1 Committed & Aligned Leadership	27	35
2 Employee & Social Inclusion	25	35
3 Employee Safety & Health	25	35
4 Employee Engagement & Learning	25	35
5 Employee Well-being	25	35
6 Employee Health & Wellness	25	35
7 Employee Development, Growth & Mobility	25	35

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WELL WORKPLACE PROCESS

The New Well Workplace Checklist

WHAT'S NEW?

- » Compare your Benchmark scores to other organizations like you.
 - » Region
 - » Industry type
 - » Company size
- » Identify opportunities and strengths at a glance
- » Deliver resource recommendations at the subscore level (coming soon)

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WELCOA'S SEVEN BENCHMARKS
Get Trained On the Seven Benchmarks

3. Members-Only Access: Take the new Certification in September

A circular logo with a dark green border containing seven white arrows pointing clockwise. In the center, the word "WELCOA" is at the top, a large number "7" is in the middle, and the word "BENCHMARKS" is at the bottom.

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WELCOA'S SEVEN BENCHMARK
New Award Process for 2019

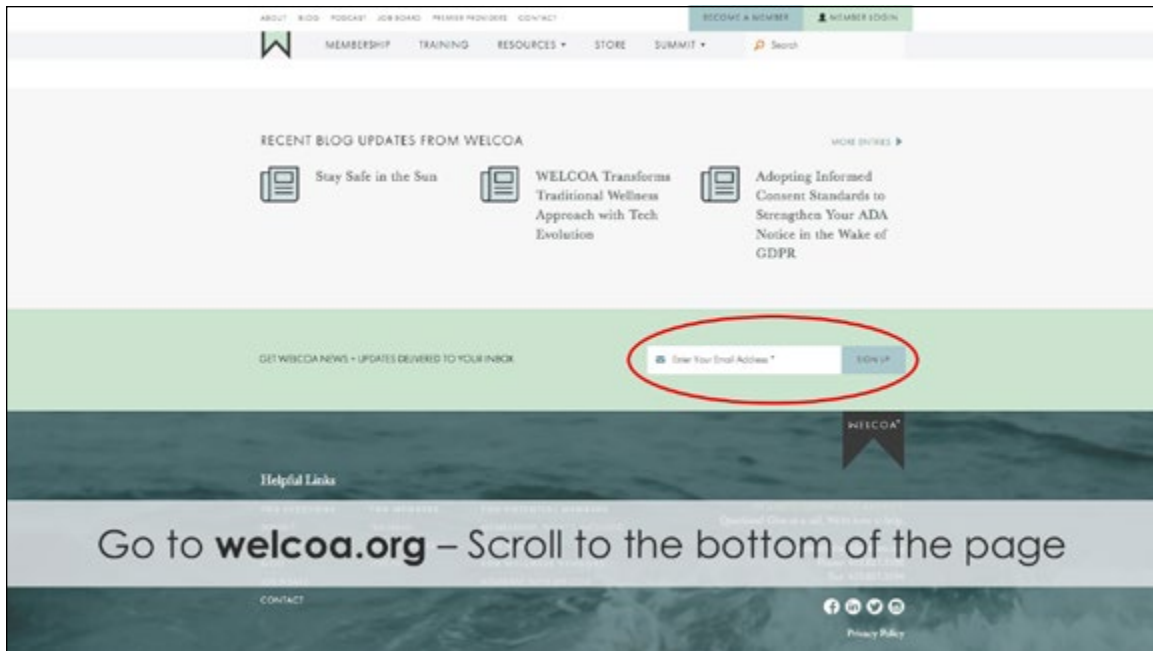
- Brand new award application coming in 2019!
- Deadline to apply for 2018 award is September 30

A 3D rendering of a blue and grey award trophy. The top part is a pyramid shape with the WELCOA logo and the text "WELCOA WELL WORKPLACE PLATINUM" on it.

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