



## Unit 1

# Need of Workplace Wellness Programs

## Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Describe the necessity of workplace wellness programs
- ✓ Create program elements that reflect the needs of employees and the objectives of the organization

## Unit 1

### Need of Workplace Wellness Programs

#### The Case for Wellness

##### Benefits of Workplace Wellness Programs

Workplaces are run by people, and those leaders understand the value of having employees who are healthy and able to work for them. It's a very rare case indeed where an employer holds the health and safety of their workforce in conscious disregard, or where they lead an operation that has no regard for health and safety. However, there is plenty that an employer has to consider when it comes to workplace wellness, including productivity, health and benefit plan costs, absenteeism, and recruiting.

In this course, we will explore the options and variables that both support the need for and influence the development of a workplace wellness program.

From a common sense standpoint, we can easily relate to the concept that healthy, fit employees can be more productive than unhealthy ones. After all, they are more likely to be at work and able to perform their job duties when they are present than they are when illness or injury keeps them off the job. At a deeper level, however, there are even more benefits for a company's bottom line.

First, companies spend a lot of money on staff. Salaries, benefits, pension contributions, and training all add up. To that, we can also add the costs of recruiting, onboarding, keeping staff motivated and engaged, terminations, and replacing people. It can be daunting to think of what it costs to replace staff, and in a tight labor market we're not inundated with resumes because the people we may want to hire are already working somewhere else.

A major benefit that people may not often think of is that we spend a lot of our time in the workplace, especially people working at least 30 hours per week. That factor alone makes our workplaces an ideal venue for promoting good health.

Traditionally, workplace programs that promote health have been a part of occupational health and safety promotions. This is important, although evidence has shown us that more comprehensive programs are even more effective at supporting health and wellness.

So, the benefits to the workplace are pretty clear and can be directly measured. However, sick employees also have a bearing outside of the workplace, as the effects of illness or injury extend to their



## Building the Foundation

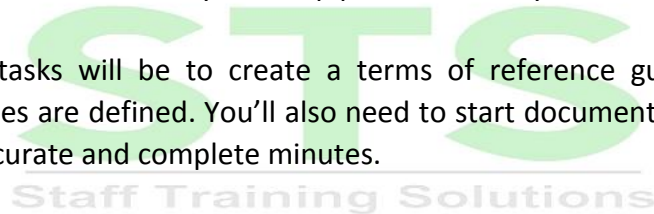
### Creating the Committee

As you consider your workplace, or the companies you do work for, give some thought to the people who can make the strongest contributions to a workplace wellness program. The people you will work with on the program need to be able to make strong contributions, including elements of program design, promotion, modeling the program to others, and making ongoing contributions to keep the program strong.

You'll need to get buy-in from the executive, have access to resources, and leverage people who will help you do the work. A broad reach for committee members will help to ensure you have diverse perspectives and interests represented. It will also help you facilitate strong links to all levels within the organization.

If you feel that the committee itself is becoming larger than ideal (after all, you'll need to orchestrate plenty of work here), consider the use of sub-committees, as long as you are also ensuring that everyone gets heard. Sub-committees can also be helpful if you are part of a large organization or are geographically spread out, since they can help promote steady communication.

One of your early tasks will be to create a terms of reference guide for your committee so that expectations and roles are defined. You'll also need to start documenting all the meetings and decisions made by keeping accurate and complete minutes.



### Sample Terms of Reference – ABC Company Wellness Committee

#### Vision

We are facilitating creation of a workplace wellness program that encourages employees to achieve ideal levels of health and wellness.

#### Mission

Supporting the health and fitness of ABC Company employees through the implementation and evaluation of a comprehensive wellness program.

#### Values

This committee will support one another in a trusting environment in order to achieve our goals of a healthy workplace.

## **Purpose**

To improve the overall operation by increasing and maintaining optimal health in our employees.

## **Roles and Responsibilities**

### *Leader*

The leader of the Wellness Committee will be a part of the committee and will be appointed by \_\_\_\_\_ (the board of directors, or the members of the committee, as fits the organization).

### *The leader will:*

- Ensure there is an agenda prior to each meeting
- Facilitate meetings so that all committee members have a chance to speak
- Provide guidance and leadership so that the committee achieves their goals
- Step in to resolve conflict that may arise as part of this committee's work
- Update management on status

### *Members will:*

- Review the agenda prior to meetings
- Submit items for the agenda as appropriate
- Complete all assigned action items
- Be prompt, courteous, and respectful in meetings and all interactions with committee members

### *The minute-taker will:*

- Be chosen through rotation (alphabetically by last name at each meeting)
- Take note of discussions and decisions made
- Clearly identify action items and person responsible
- Distribute minutes to committee members within 24 hours of the meeting

## **Decision Making**

The wellness committee will achieve decisions through consensus. Where consensus is not achieved, the leader will utilize a problem solving methodology to assist in achieving outcomes. If consensus or compromise is not achieved through these methods, the committee will take a majority vote.





In addition to asking for information on what kinds of programs exist, you can also determine the type of resources (such as people, equipment, and money) you might need. Some of us have champagne wishes and beer budgets, while others have access to adequate or even generous budgets. Do you know what yours is yet?

**Identify specific resources that you will use in order to gather the information that you need.**

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## Workplace Organizational Culture

### Defining Culture

Workplace organization culture includes the attitudes, values, and beliefs that shape your organization. They may be stated or unwritten, but they are present in interpersonal relations and people's work, and they influence the success of the company. Workplace culture also influences employee morale, productivity, and overall health. It has an important role in determining workplace satisfaction and employee engagement, and is a factor in employee stress levels. A strong, vibrant workplace organizational culture provides the foundation for good health at work.

Elements of organizational culture include aspects such as:

- Management style
- Communication skills
- Leadership capacity
- Work/life balance
- Perceptions of fairness
- Workload
- Autonomy
- Feeling appreciated
- Social support

As you can see, it's a pretty loaded topic!

**Questionnaire**

**Rate your organization on the following items. 1 means “not so much” and 5 means “we’re doing a brilliant job.”**

Item	1	2	3	4	5
I know what is expected of me from one day to the next in my role.					
I receive the right level of mentoring and training for what I need.					
I am comfortable communicating with people at all levels of the organization.					
I have input in decision making.					
I take all my vacation days each year.					
I am able to direct myself, the order I complete my work, and how I get it done.					
We have an effective employee recognition program and process.					
There is support for employee health and wellness.					
I know how my role and what I do contributes to overall team or company success					
I feel like the leaders of this company care about me as an individual.					

**Scoring**

If you scored between **10 and 30**, it's a great thing that you are working on a workplace wellness strategies, because it seems like your organization can really use it!

If you scored between **31 and 40**, it seems like things are off to a good start. Keep learning, improving, and changing in order to get the most out of it.

If you scored between **41 and 50**, you should probably be teaching this course. Great work! Keep it up!

## Gathering Support

### Taking Action

In order for the program to succeed, two key elements must be present:

- Senior executive and leadership support and modeling
- Employee utilization

**Brainstorm ways for each group to get involved.**

**Senior executives and leadership can get involved by:**



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**Employees can get involved by:**

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Challenges with data can include statistics that make it look like we have done something that may or may not be the case. For example, if we implement a workplace wellness program and in 12 months we determine that our use of casual sick days has declined, we might want to attribute the change to the presence of the wellness program, but it could be something else. Perhaps we no longer pay for sick days, or now all sick days must be supported by a sick note. Or perhaps we are using more casual and temporary staff that don't have sick leave coverage, so although they may indeed be sick, they are not counted in our statistics.

To help avoid this, know what it is you intend to count. For example, let's say you want to design a program aimed at chronic disease management. You select a healthy heart style of program to help employees get educated and prevent heart disease. In such a program you may not see a directly measureable result for years. However, if you arrange for two workshops a year and help staff attend a free cardiac program offered in your city, then you have employees who were not participating before taking part now. That statistic is measureable. Will there be a direct reduction in cardiac medications noted on your drug plan utilization? Not necessarily, but that doesn't mean people aren't better off for it.

If you support a clinic for influenza vaccination and in the first year 20% of the employee population participates that probably doesn't mean much. However, if 20% participate in the first year and 40% participate in the second, then you have increased involvement by 100% for that particular program. A coinciding decrease in absences due to influenza would also be helpful, but due to concerns with privacy and confidentiality, it may not be something you can measure.

Other methods of measurement can include some more creative and very helpful tools, one of which is your employee engagement survey (sometimes called an employee satisfaction survey). If you conduct a survey from time to time, especially if the questions remain the same or similar from one period to the next, it is possible to track questions related to employee wellness (provided they are confident that their answers remain confidential). Ask them about how engaged they are in their work, if they feel their workload is reasonable, if they have tools and resources they need, and if they would recommend you as an employer to their best friend. Look at your injury rates and claims history for work related illness and injury, too (available from your Workers' Compensation Board reports). You can also consider whether you would qualify as an employer of choice in your region, industry, or country.

### **Current Reality – Pre-Assignment Review**

**What is the impact of high turnover on employee satisfaction?**

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Reading a textbook, article, or any research source is different from leisure reading. You need to quickly identify what you need to read. Then, you need to be able to read and process the information effectively and efficiently.

There are many models out there for effective reading, but they are all quite similar. Here is our suggested model, which you can remember with the acronym **GO-PARSE**.

### **Get Organized**

We recommend that you gather the tools that you need before you begin reading. We like pens that have a highlighter on one end, a pen on the other, and small sticky flags in the body. Or, you can gather these tools separately. (Regular-sized sticky notes can also be useful.) Make sure that you have a notepad or your laptop (with plenty of battery charge) handy, too.

If you can't markup the material that you're reading, photocopy it if possible, or scan it into your computer. Just make sure that you follow any copyright or reprinting rules.

### **Preview**

Take about ten minutes to preview the material. Flip through it and see how it is organized. Pay attention to titles, sub-titles, and graphics. Introductions, summaries, and test activities can also be good signposts.

If the book covers more information than you need, identify the sections or sub-sections that you will want to read. Don't go any lower than that; otherwise you risk reading out of context.

### **Ask**

Make a list of questions that you are looking to answer. If you are stuck for ideas, turn each section heading (for the sections that you will read) into a sub-heading.

Remember the **five W's** and the **H**:

- Who
- What
- When
- Where
- Why
- How

## Read

Now it's time to read the text and mark it up. Break the text into sections if it's not broken up for you; five to eight pages is usually a good range. Read each section, one at a time, while keeping your focus questions in mind.

Here are some tips for effective reading:

- Read difficult passages several times.
- Do not try to speed read or skip over words.
- If you are having trouble understanding a passage, read it out loud or move your lips.
- If you get stuck on a section, mark it and come back to it later.

Once you have read a section, go back through it and underline the main points with a highlighter. Just highlight the main points or keywords – there isn't any point in marking up entire pages of text.

In addition to highlighting, you can:

- Add numbers
- Draw shapes and arrows
- Draw vertical lines in the margin to highlight large areas of importance (like summaries)
- Use symbols to mark key points (such as \* for a definition, \$ for statistics, ? for things you want to check up on later or that you don't agree with)
- Use acronyms to mark key points ("def" for a definition, for example)
- Use different colored highlighters or pens to mark different categories of items
- Write notes in the margins or on sticky notes attached to the page

Just make sure that you are consistent and don't overdo it. Remember that markup is intended to help you find important points later, so don't markup the whole page – just the key points.

## Summarize

Now it's time for a third pass on the document and to take notes on what you have read, either by hand or with a computer.

At the beginning of your notes, include full bibliographical information, including:

- Document title
- Full name of all authors
- Publisher and publication date
- Editor, if applicable
- Copyright date(s)

- Volume(s)
- Edition number
- Translator
- ISBN number
- Any other pertinent information

Note what page each piece of information came from. (The margin is a good spot for this.) Separate your notes into the same sections as the document, and use the same underlining/markup system.

Try to avoid copying text word for word. If you do this, clearly mark it as a quote in your notes and indicate what page it came from. Do, however, include your thoughts, analysis, and questions. Again, be sure to mark them as such – perhaps using a different colored pen or highlighter.

Here are some common shorthand symbols.

Shorthand Symbol	Meaning
<	Decrease
>	Increase
=	Is the same as, means
≠	Is not the same as, does not mean
~	Is similar to
→	Causes, leads to
∴	Therefore
✓	Correct
C	Incorrect
i.e.	That is
e.g.	Example
vs.	Versus

### Some other tips:

- Remove vowels to shorten words. For example, “shorthand” becomes “shrthnd.”
- Write compound words as their initials with slashes. “Because” becomes “b/c.” Without becomes “w/o.” Individual becomes “i/d” or “i/v.”
- Over time, you will create your own shorthand. Be consistent and use what works for you.

If you are taking notes by hand, make sure that they are legible, leave lots of white space, and number your pages. If this will be an extensive project, you may want to put your notes into a three-ring binder, with tabs for each book that you have notes on. If you are taking notes electronically, use different files for different books. There are also programs designed for taking notes, like Microsoft OneNote, Annotate, and Jamal.

### Evaluate

For the final step, read through your notes with the textbook beside you. Add any extra notes or markup as necessary. As the final page to your notes, write out the questions that you developed in the Ask stage and write the answers that you received.

## Performing a Needs Analysis

### The ICE Method

One of the most important undertakings you’ll complete before designing your program is the needs analysis. This formal type of assessment will help you identify the following:

- The objectives of the organization and executive in terms of wellness
- The needs and wants of employees in terms of wellness
- Gaps between employees current and optimal health status
- Wellness initiatives that are needed
- Wellness initiatives that would be nice to have
- Wellness initiatives that may not be needed
- When a wellness initiative is not the right approach
- The benefits and negative aspects of wellness programming
- A method for collecting feedback and evaluating the program

## When is a Wellness Program Not Appropriate?

When there are high rates of absenteeism, illness, injury, or a disengaged workplace, a wellness program might be desired as a corrective measure to help improve health, protect the company's reputation, or make up for other shortcomings.

Whether the focus is decreasing the prevalence of chronic health problems, improving attendance, or serves the company's reputation as an employer of choice, a wellness program might be the best approach. However, there are other factors that can lead to the problems mentioned, and they have a bearing on decisions made at this time.

When the following issues are present, a wellness program is not going to resolve the underlying problems.

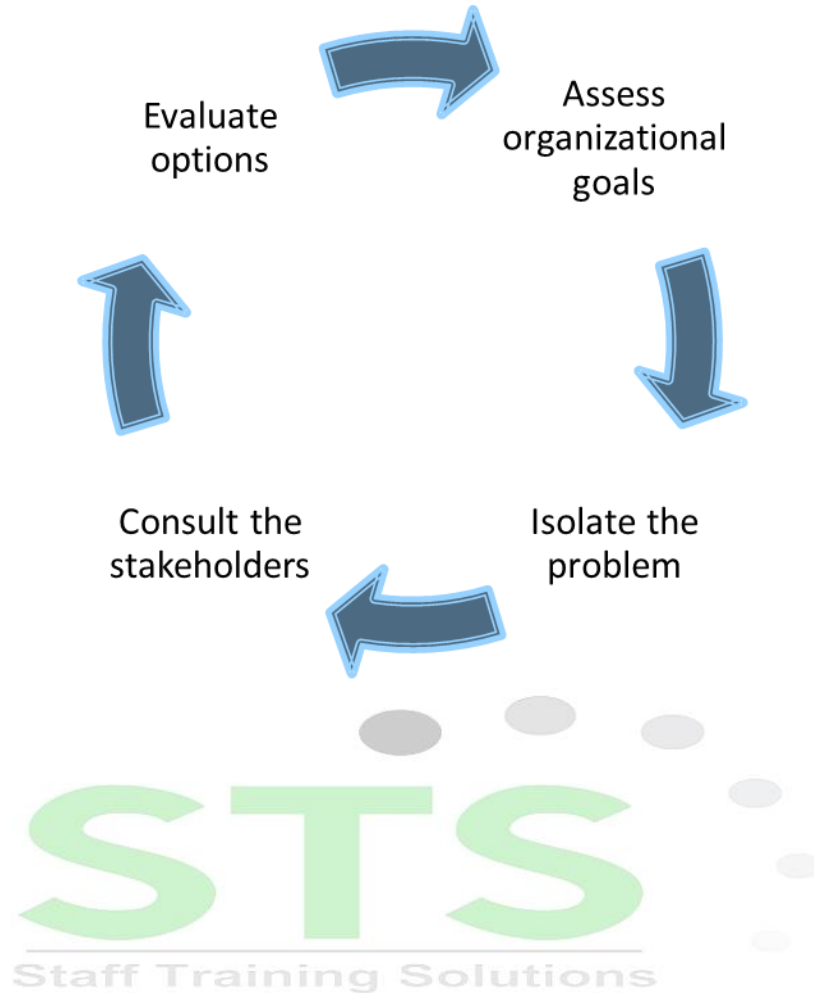
- Employee disregard for health and safety contributing to incidents of illness or injury
- Company disregard or lack of commitment to health and safety policies contributing to incidents of illness or injury
- Open conflict among work teams, including between executive and mid-management
- Inability for employees to avail themselves to wellness programs for reasons of motivation, financing, threat of layoff, or other demoralizers
- Lack of commitment and modeling by workplace leaders, including the executive
- Employee satisfaction (or engagement) scores that show multiple contributors to low scores

## Three Steps

Staff Training Solutions

When you are ready to undertake the wellness program needs analysis, using the term ICE will ensure that you include all of the necessary steps.

- **Isolate** the problem.
- **Consult** with appropriate stakeholders to assess the effects the problems are having on the organization.
- **Evaluate** options and set up an action plan that meets organizational needs and assemble the support that you need.



## Isolating

Isolating the problem effectively will help you to determine whether there is one main issue, or whether several smaller issues are having a significant impact. Several techniques are available to you in this process, and each has its own benefits and shortcomings. Sometimes a mixed approach is best if time and resources are available, in order for you to get the most comprehensive answer.

Techniques may include observation of people as they work; questionnaires; consultation and interviews; testing; reviewing work samples; and researching documentation included in employee evaluations, employee engagement reports, insurance utilization statistics, program reports, etc.

You are looking for surface problems, such as an obvious need for nutrition, health, or prevention, where employees need education or skill development. You also have to be able to identify underlying problems. The underlying issues can be more difficult to define, but they are an important part of a thorough analysis.

An additional benefit of isolating the problem is that it can help you to obtain background material that you can draw on for presenting your case for a wellness program, and determining which elements of a

program are best for your organization. Using real, concrete examples in your business case can make it much stronger.

## Consulting

Sometimes employees would like access to wellness programming, but that programming does not support the goals of the organization. You will find it very difficult to gain approval and resources for programming that does not support the strategic plans of the organization.

At the same time, if the company is not aware of issues that the employees are experiencing, then part of your role can include reporting where the problems are and resolving them by designing an appropriate wellness plan. If you can identify the problem areas, relate them to the organizational strategic plan, and demonstrate the value of the program to the organization (their return on investment, or ROI), then you are much more likely to receive support for the initiative.

For example, a group of employees who work in physical jobs but are noticeably obese are at obvious risk for physical conditions like injury to their knees, hips, and backs. They may be able to restore strength and stamina if the employer helps them to stay fit with exercise, nutrition, and health support. On the other hand, if you review the costs of drugs being purchased through your health plan and determine that the highest costs are for stomach problems and mental illness, those issues may have to be analyzed in light of the obvious problems that you can see.

## Evaluating

Next, you will thoroughly examine the results of your interviews and investigation to determine what wellness programming is required. At this stage, you may recognize that wellness initiatives are not the best option for some issues. This can be the case where, for example, staff are not meeting their goals because of performance issues or unclear expectations about their roles and priorities.

Depending on the needs identified, you will also determine the best wellness initiatives to use and include them in your needs analysis. Workers will be affected by the full spectrum of risk, medical disorders, emotional, and physical health factors. There are as many initiatives possible as there are different people, from smoking cessation, nutrition, exercise, developing resilience, emotional intelligence, career counseling, and influenza immunization clinics, to the structuring of health and benefit plans.

## Making the Pitch

**How can you make your case for a workplace wellness program? List the pros and cons for each method.**

Idea	Pros	Cons

