

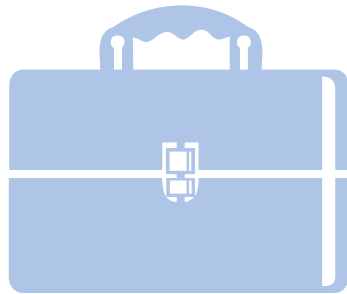
YOUR SOURCE for QUALITY CUSTOMIZED RESOURCES on CURRENT HEALTH ISSUES

# WORKPLACEwellness

*A healthy workplace is a great investment*

*Workplace Wellness*

## TOOLKIT



COMPANY: \_\_\_\_\_

REPRESENTATIVE: \_\_\_\_\_

DATE: \_\_\_\_\_

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## INTRODUCTION

The concept of workplace health can be new and exciting for an organization. The comprehensive workplace health model presented in the *Workplace Wellness Toolkit* has been created to assist workplaces on their path to promoting wellness. Some of the resources have been adapted, with permission, from best practice guidelines, The Health Communications Unit<sup>1</sup> and Halton Region Health Department<sup>2</sup>.

It is recommended that the various sections of this toolkit be followed step-by-step in order to build a successful and sustainable health model in your workplace. Workplaces may choose to move through all of the steps very quickly or choose to adopt a more gradual, guided approach to developing their wellness plans.

The *Workplace Wellness Toolkit* is divided into three main sections: [Planning](#), [Implementing](#) and [Evaluating](#). Each section contains various activities and resources that will help you promote wellness in your workplace. This toolkit can be completed and printed for documentation purposes,

serving as a snapshot of activities that have been implemented within your workplace.

Two other sections, [Contacts](#) and [Links](#), have been included for supplementary reading and support.

[Planning \(Steps 1-6\)](#)

[Implementing \(Step 7\)](#)

[Evaluating \(Step 8\)](#)

[Contacts](#)

[Links](#)

York Region Workplace Wellness is available to support your organization in developing a comprehensive workplace health program. Our contact information can be found in the [Contacts](#) and [Links](#) sections of this toolkit.

Please provide us feedback on the usefulness of the *Workplace Wellness Toolkit* by completing a short survey in the [Contacts](#) section.

<sup>1</sup> THCU (2008, September). *Introduction to comprehensive health promotion (CWHP)*. Retrieved May 25, 2011, from [http://www.thcu.ca/resource\\_db/pubs/771388233.pdf](http://www.thcu.ca/resource_db/pubs/771388233.pdf)

<sup>2</sup> The Regional Municipality of Halton. *Setting up a wellness program*. Retrieved May 25, 2011, from [http://www.halton.ca/working\\_in\\_halton/workplace\\_health\\_information\\_for\\_employees/setting\\_up\\_a\\_wellness\\_program/](http://www.halton.ca/working_in_halton/workplace_health_information_for_employees/setting_up_a_wellness_program/)

## WHY COMPREHENSIVE WORKPLACE HEALTH?

More than 15 million Canadians spend over half of their waking hours at work<sup>3</sup>. This statistic alone makes the workplace an excellent venue for promoting the health of Canadians.

A healthy workplace benefits both the employee and the organization and results in:

- Decreased worker absenteeism
- Fewer insurance and disability claims
- Improved productivity
- Fewer accidents on the job
- Increased staff retention
- Enhanced business reputation
- Improvement in staff attitudes and higher staff morale<sup>4</sup>

Traditionally, programs that promote the health of employees have focused primarily on occupational health and safety (OHS) initiatives. Although this is an integral part of employee health, current evidence has shown a more comprehensive approach to health and wellness is more effective. A comprehensive approach includes OHS initiatives but should also factor in organizational change or culture and the health practices of workers.

For more information on comprehensive workplace health, please download the [Why Workplace Health? The Business Case for Comprehensive Workplace Health](#) document. More information is also available in the [Contacts](#) and [Links](#) sections of this toolkit or visit [www.york.ca/workplacewellness](http://www.york.ca/workplacewellness).

<sup>3</sup> Health Canada, 2001

<sup>4</sup> The case for comprehensive workplace health promotion. THCU, 2004

## PLANNING (STEPS 1-6)

This first section will help you and your organization plan for comprehensive workplace health programming.

Each of the following six sub-sections contain various tools and resources that can assist you in the planning stage of your comprehensive workplace health programs.

[Management Support \(Step 1\)](#)

[Workplace Wellness Committee \(Step 2\)](#)

[Situational Assessment \(Step 3\)](#)

[Multi-Year Health Plans \(Step 4\)](#)

[Short Term Health Plans \(Step 5\)](#)

[Management Approval \(Step 6\)](#)

# PLANNING (CONTINUED)

## Management Support (Step 1)

An important first step in developing a comprehensive workplace health program is to ensure the support of organization leaders. The level of commitment from senior management is directly linked to the success of wellness programs.

Employers are able to provide support and assistance as the program grows, and along with employees, they will also gain many benefits.

### Organizational Commitment Progress Checklist

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CHECKLIST: Gaining organizational commitment to implement comprehensive workplace health

Progress Checklist	Notes
<input type="checkbox"/> The organization supports establishing a comprehensive workplace health program	
<input type="checkbox"/> The organization is willing to find out the needs and interests of employees	
<input type="checkbox"/> The organization is prepared to respond to the workplace health needs and interests of employees	
<input type="checkbox"/> Senior management is committed to playing a visible, ongoing and participatory role in the program	
<input type="checkbox"/> The union/employee association is supportive of the workplace health program	
<input type="checkbox"/> A letter of commitment has been signed by all key parties	

**Further reading:**

The Health Communication Unit has created a business case titled, *The Case for Comprehensive Workplace Health Promotion: Making Sense* and provided the business case presentation for workplace wellness, visit [http://www.york.ca/workplace/documents/business\\_case\\_WHL\\_2014.pdf](http://www.york.ca/workplace/documents/business_case_WHL_2014.pdf)

[www.york.ca/workplace/wellness](http://www.york.ca/workplace/wellness)

# PLANNING (CONTINUED)




## Workplace Wellness Committee (Step 2)

When creating a Workplace Wellness Committee, it is important to include representation from all levels of the organization including senior management, employee representatives, employee associations such as unions and stakeholder departments such as human resources, occupational health and safety, and training and development.

Having a variety of committee members will bring diverse perspectives and consistent communication links to all levels of staff within the organization and will lead to a more successful comprehensive workplace health program.

Developing a Terms of Reference for your Workplace Wellness Committee will establish expectations and roles for committee members. As with any committee, it is important to document discussions and decisions made at meetings through the use of minutes.

The following resources will help you build an ongoing and successful Workplace Wellness Committee:

-  [Workplace Wellness Committee Progress Checklist](#)
-  [Meeting Minutes Template](#)
-  [Terms of Reference Sample](#)

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**CHECKLIST: Form a wellness committee**

Progress Checklist	Notes
<input type="checkbox"/> The committee includes a broad selection of members including management, union, occupational health & safety and human resources	
<input type="checkbox"/> The committee has elected a chairperson	
<input type="checkbox"/> A Terms of Reference has been developed for the committee	
<input type="checkbox"/> The committee has regularly scheduled meetings	
<input type="checkbox"/> There is a vision statement to guide the development of the workplace health program	
<input type="checkbox"/> Management and employees support the vision statement. It is referenced or referred to other strategic planning, policies and/or programs existing in the organization	
<input type="checkbox"/> The committee keeps minutes of meetings, including records of decisions, actions and progress	
<input type="checkbox"/> The committee communicates with employees, management and the union as an ongoing basis	
<input type="checkbox"/> Management regularly updated on committee progress and activities	

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**TEMPLATE: Meeting minutes**

DATE: \_\_\_\_\_ PRESENT: \_\_\_\_\_ REQUEST: \_\_\_\_\_

Agenda Item	Topic/Issue	Action	Person Responsible
1.			
2.			
3.			
4.			
5.			
6.			

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**SAMPLE: Terms of Reference for a workplace wellness committee**

**Vision**  
To work towards creating a workplace that allows and encourages employees to reach and maintain their optimal level of health.

**Mission**  
To identify, implement and evaluate a comprehensive workplace wellness program with a supportive culture, thereby supporting and enhancing the health and well-being of its employees.

**Purpose**  
To improve the overall health of our organization and the well-being of our employees.

**Membership**  
The committee will consist of employees and management from across the organization. The committee membership will be renewed on an annual basis.

**Wellness Committee Values**  
We value and expect open communication. As a committee, we will support each other in a safe and trusting environment while working towards our vision, mission and purpose. We will demonstrate these values by following the rules and responsibilities as described below.

**Rules and Responsibilities**

**Chair**  
The Chair of the Wellness Committee will be a committee member and will be chosen via committee nomination.  
The Chair will:  

- Draft the agenda prior to meetings
- Ensure all committee members have a chance to speak and be heard at meetings
- Guide committee members toward a common goal
- Resolve conflicts and any miscommunication that may occur related to the workplace wellness program
- Share meeting minutes with management

**Participants**  

- Review the agenda prior to committee meetings
- Be present and regular in attendance and send regrets to Chair if unable to attend
- Provide topic specific dialogue and constructive feedback at meetings

**Meeting Order**  

- The Minutes shall be read alphabetically
- One hour of committee discussion at meetings, clearly identify action items and joint plans for action
- Provide responses to committee members in a timely fashion

**Meetings**  
Meetings will be held \_\_\_\_\_ There will be a minimum of \_\_\_\_\_ meetings per calendar year.

**Decision Making Process**  
The Wellness Committee will make every attempt to reach consensus on decisions. If consensus or compromise cannot be reached, the Wellness Committee will take a majority vote.






Approved \_\_\_\_\_  
(Date)

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# PLANNING (CONTINUED)

## Situational Assessment (Step 3)

Assessing and understanding employees' needs and preferences is an essential part of the process of developing a wellness program in the workplace. If a workplace health program is going to be successful, it needs to reflect what employees consider important. The resources listed below will help you:

-  [Assessing Employee & Organizational Needs Progress Checklist](#)
-  [Health Situational Assessment Tool](#)
-  [Sample Employee Interest Survey](#)
-  [Tri Fit Organization Health Audit](#)
-  [Workplace Organizational Culture Checklist](#)

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CHECKLIST: Assessing employee and organizational needs

Progress Checklist	Notes
<input type="checkbox"/> A meeting plan for the completion of the needs assessment by employees is developed and highlights the value and benefits	
<input type="checkbox"/> The timing of the assessment in terms of conflicts with other major events (e.g., holidays, labour negotiations) was considered	
<input type="checkbox"/> "Lead to reach groups" of employees (e.g., shift work, varying literacy levels) were identified and a plan to reach them developed	
<input type="checkbox"/> The assessment is representative of the organization. No employee groups have been missed (e.g., department, age group, sex, job classification, language)	
<input type="checkbox"/> The workplace has been analyzed to ensure healthy choices are available and accessible (e.g., healthy food options, places to walk, bike racks, etc.)	
<input type="checkbox"/> A sufficient number of employees responded to the needs assessment (e.g., at least 50% of employees need to respond to be representative of your workplace)	
<input type="checkbox"/> Workplace statistics have been assessed to verify the program (e.g., benefits rates, CPR usage, employee age and health levels)	
<input type="checkbox"/> A review of how the organization does/does not promote work life balance is completed	

Continued on next page

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COMPREHENSIVEworkplace  
health situational assessment tool

The Comprehensive Workplace Health Situational Assessment Tool identifies existing support programs and policies in the work environment. The information obtained with this tool can be used to plan activities and programs. It will also identify needs and information where you are currently lacking to support comprehensive workplace health in your organization. This tool should be used in conjunction with a survey designed to identify employee health interests.

BACKGROUND INFORMATION

1. Name of business: \_\_\_\_\_
2. Type of business: \_\_\_\_\_
3. One name and location: \_\_\_\_\_
4. Number of employees: \_\_\_\_\_
5. Age range: \_\_\_\_\_
6. Average age: \_\_\_\_\_
7. Gender balance (Check only one)
  - ☐ Mostly male
  - ☐ Mostly female
  - ☐ Equally male and female
8. Estimate number of employees who are new immigrants: \_\_\_\_\_
9. Type of workers (Check all that apply)
  - ☐ Full-time employees
  - ☐ Part-time employees
  - ☐ Seasonal employees
  - ☐ Other \_\_\_\_\_
  - ☐ Self-employed
  - ☐ Outsource workers
  - ☐ Unemployed employees
10. Does your workplace have multiple office locations?
  - ☐ Yes
  - ☐ No
11. Please indicate methods of communicating with employees. (Check all that apply)
  - ☐ Newsletters
  - ☐ Internet
  - ☐ Email
  - ☐ Intranet
  - ☐ Flyers
  - ☐ Pay change inserts
  - ☐ Meetings
  - ☐ Posters
  - ☐ Bulletin boards
  - ☐ Other (please specify): \_\_\_\_\_

Continued on next page

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sample employee interest survey

TO: All Staff

FROM: \_\_\_\_\_

DATE: \_\_\_\_\_

RE: Workplace Wellness Employee Interest Survey

Workplace health and wellness programs are beneficial to both the employee and the employer. By taking steps to improve our health, we can influence our work and home lives in a positive way.

We would like to learn more about your interest in health and wellness related activities. Your input is valuable and will help us plan employee wellness changes to meet your needs.

Please keep the following items in mind when completing this survey:

- all information is confidential and anonymous (do not write your name on this survey)
- your participation is voluntary
- there are no right or wrong answers

Please return your completed survey to \_\_\_\_\_ by \_\_\_\_\_

If you have any questions regarding the survey, please contact \_\_\_\_\_

Thank you.

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**Organizational Health Audit**  
A comprehensive tool developed by Tri Fit Inc., 1988  
Revised by York Region Workplace Wellness, 2009

The purpose of the Organizational Health Audit is to build awareness about workplace health within your organization. It can also serve to help you recognize workplace initiatives that positively influence employee health and well-being and to identify organizational health opportunities within your workplace.

This audit assesses the following aspects of your organization:

1. Corporate Culture
2. Policies, Procedures & Work Processes
3. Programs and Services
4. Physical Environment

How to Complete the Audit:  
Members of your Healthy Workplace Committee, if you have one, who have experience with the different aspects of your organization listed above, can complete the audit individually. Depending on the size and complexity of your organization's structure, and/or if you do not have a committee, you may wish to ask a few others in the organization to complete the audit so that it provides a good snapshot of the entire organization. For instance, you may ask departmental managers/supervisors, union representatives, frontline employees, and directors to participate in the audit. When each individual completes the questions below independently, discuss all responses as a group with your Healthy Workplace Committee to determine a final score.

Score the maximum number of points if your organization encourages and/or provides the service, policy, program or facility. Deduct points if you have the degree to which the initiative offered is limited. For example, if programs are "one time" awareness programs deduct one or more points from each. If you have added information under the other category please assign up to 5 points and add these to your final score.

Organizational Health Audit

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Workplace Organizational Culture

What is it?  
Workplace Organizational Culture refers to the attitudes, beliefs, and values that shape the way people work together. It is the "personality" of the organization that influences how employees interact with each other and with the organization.

How to assess it?  
Assess the following aspects of your organization's culture:

- Mission and vision statements
- Core values
- Communication style
- Decision-making process
- Employee recognition and rewards
- Training and development opportunities
- Work-life balance initiatives
- Health and wellness programs
- Safety and security measures
- Environmental sustainability efforts
- Community involvement and social responsibility

Score the maximum number of points if your organization encourages and/or provides the service, policy, program or facility. Deduct points if you have the degree to which the initiative offered is limited. For example, if programs are "one time" awareness programs deduct one or more points from each. If you have added information under the other category please assign up to 5 points and add these to your final score.

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## PLANNING (CONTINUED)

### Multi-Year Health Plans (Step 4)

The Workplace Wellness Committee may review information collected from the situational assessment, communicate the information to employees and put together a plan or blueprint for the development of a comprehensive workplace health program.

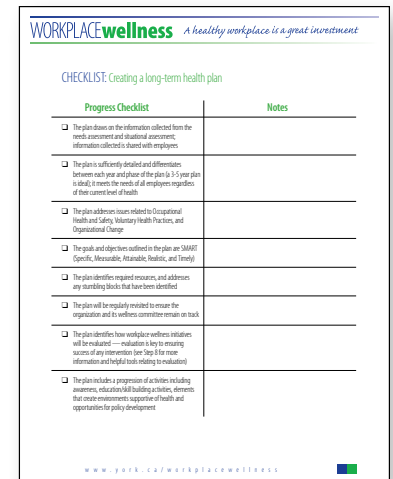
The plan may identify key issues or findings, make program recommendations, identify required resources and establish a timeline for the implementation of the recommendations. Plans should address occupational health and safety, voluntary health practices and organizational change. They should include awareness building, education and skill building, environmental supports and policy development.

Key components of a comprehensive workplace health plan should:

- Meet the needs of all employees regardless of their current level of health, literacy, ethnicity, social and skill backgrounds
- Balance employee wants and what the employer can do
- Address employee concerns
- Be kept confidential until approved by the Workplace Wellness Committee and other key stakeholders involved
- Be shared with all employees once approved by the committee
- Be brief, easy to read and updated regularly as required

The Workplace Wellness Committee may need to start small and focus on key areas identified in the needs assessment and on issues that management supports. Changing an organization into one that supports a comprehensive workplace health program will take time.

 Long Term Health Plan Progress Checklist



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CHECKLIST: Creating a long-term health plan

Progress Checklist	Notes
<input type="checkbox"/> The plan draws on the information collected from the needs assessment and situational assessment; information collected is shared with employees	
<input type="checkbox"/> The plan is sufficiently detailed and differentiates between each year and phase of the plan (a 5-year plan is ideal); it meets the needs of all employees regardless of their current level of health	
<input type="checkbox"/> The plan addresses issues related to Occupational Health and Safety, Voluntary Health Practices, and Organizational Change	
<input type="checkbox"/> The goals and objectives outlined in the plan are SMART (Specific, Measurable, Attainable, Realistic, and Timely)	
<input type="checkbox"/> The plan identifies required resources, and addresses any spending blocks that have been identified	
<input type="checkbox"/> The plan will be regularly reviewed to ensure the organization and its wellness committee remain on track	
<input type="checkbox"/> The plan identifies how workplace wellness initiatives will be evaluated — evaluation is key to ensuring success of any intervention (see Step 5 for more information and helpful tools relating to evaluation)	
<input type="checkbox"/> The plan includes a progression of activities including awareness, education and building a culture, elements that ensure employees' support of health and opportunities for policy development	

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## PLANNING (CONTINUED)

### Short Term Health Plans (Step 5)

Based on the multi-year health plan, the Workplace Wellness Committee can now develop a detailed action plan for the upcoming or ongoing year. The action plan outlines the program objectives, activities and evaluation methods that will be undertaken.

Developing a plan for activities is more likely to result in successful initiatives. The program activity plan needs to be revisited regularly to check on progress and to make any modifications. The most effective plans are comprehensive in nature and include a variety of activities ranging from awareness building to policy development.

-  [Workplace Wellness Committee Annual Action Plan](#)
-  [Workplace Wellness Action Plan Progress Checklist](#)

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TEMPLATE: Workplace Wellness Committee annual action plan

GOAL \_\_\_\_\_

OBJECTIVES \_\_\_\_\_

Activity	Lead	Task/Item	Start Date	Target Finish	Estimate Resources	Evaluation

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CHECKLIST: Creating a workplace wellness action plan

Progress Checklist	Notes
<input type="checkbox"/> The action plan is based on the results of the employee needs or interest survey and the workplace situational assessment	
<input type="checkbox"/> The plan includes recommendations for implementation in the short- and long-term	
<input type="checkbox"/> The recommendations are appropriate and achievable	
<input type="checkbox"/> The plan is comprehensive. It takes a variety of health promotion strategies to approach health and wellness (e.g., policy development, environmental supports, education, awareness, and skill building)	
<input type="checkbox"/> The Workplace Wellness Committee approved the plan	
<input type="checkbox"/> The plan has been communicated to all employees	
<input type="checkbox"/> The plan has identified methods to evaluate activities (see Step 6 for more information on evaluation)	
<input type="checkbox"/> An ongoing marketing/communication plan has been developed to increase awareness and promote participation in activities	

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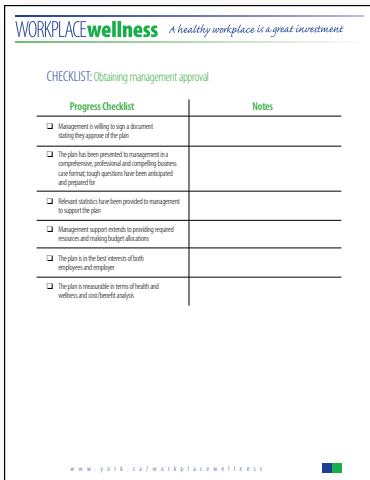
## PLANNING (CONTINUED)

### Management Approval (Step 6)

Once the work plan is prepared, it is essential that senior management reviews and approves the work plan, and supports any financial or human resource allocations that will be required.

The following resource will help you present the plan to management and gain their approval:

 [Management Approval Progress Checklist](#)



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CHECKLIST: Obtaining management approval

Progress Checklist	Notes
<input type="checkbox"/> Management is willing to sign a document stating they approve of the plan	
<input type="checkbox"/> The plan has been presented to management in a comprehensive, professional and compelling business case format; tough questions have been anticipated and prepared for	
<input type="checkbox"/> Relevant statistics have been provided to management to support the plan	
<input type="checkbox"/> Management support extends to providing required resources and making budget allocations	
<input type="checkbox"/> The plan is in the best interests of both employers and employees	
<input type="checkbox"/> The plan is measurable in terms of health and wellness and cost/benefit analysis	

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## IMPLEMENTING (STEP 7)

It is now time to put your comprehensive workplace health program into action!

A detailed work plan guides the implementation of the program in terms of timing, content, strategies, monitoring and evaluation. It is important to maintain communication with employees, promote the program and initiatives, receive and respond to any feedback, monitor the progress of the plan and adopt recommendations for changes accordingly.

### Annual Program Action Plan

-  [Annual Program Action Plan Progress Checklist](#)
-  [Communications Initiatives Template](#)

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CHECKLIST: Implementing the annual program action plan

Progress Checklist	Notes
<input type="checkbox"/> The annual plan has been approved and shared with staff	
<input type="checkbox"/> A marketing plan is in place to ensure the plan gets adequate buy-in from staff	
<input type="checkbox"/> The action plan is monitored and modified as needed to help ensure success	
<input type="checkbox"/> The plan is comprehensive and focuses on a few identified needs as prioritized by employees	
<input type="checkbox"/> Required resources have been approved and obtained (e.g., staff time, funding, administrative support, etc.) to carry out the plan	
<input type="checkbox"/> Timelines and people are assigned to specific tasks	

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TEMPLATE: Communications initiatives

GOAL: \_\_\_\_\_

OBJECTIVE: \_\_\_\_\_



Target Audience: Who are we trying to reach?	Key Messages: What do we want to say to each stakeholder?	Tasks: What needs to be done?	Timeline: When do we want to start and end?	Evaluation: How do we measure progress and success?

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## EVALUATING (STEP 8)

Evaluation is the systematic collection, analysis and reporting of information about a program. Programs and initiatives need to be evaluated based on goals and objectives set during the planning stage.

Monitoring and evaluating your comprehensive workplace health program is important. It provides accountability while also allowing for input from employees, the sharing of successes with the organization and the making of changes to the action plan as necessary.

-  [Evaluating Workplace Wellness Program Progress Checklist](#)
-  [Workplace Wellness Evaluation Plan](#)

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CHECKLIST: Evaluating your workplace wellness program

Progress Checklist	Notes
<input type="checkbox"/> Evaluation is ongoing and built into the action plan	
<input type="checkbox"/> There is a plan for both process and outcome evaluation	
<input type="checkbox"/> An evaluation method has been identified (e.g., group feedback, survey)	
<input type="checkbox"/> Evaluation success criteria have been identified (e.g., increased employee health, decreased benefits costs, decreased LTP usage, fewer workplace accidents, etc.)	
<input type="checkbox"/> Revisions/adjustments to the plan have been identified based on evaluation results	
<input type="checkbox"/> Evaluation results have been communicated to employees, unions, management, etc.	
<input type="checkbox"/> A person has been assigned to be responsible for program changes based on evaluation results	
<input type="checkbox"/> A timeline has been assigned to complete the changes	

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TEMPLATE: Workplace Wellness evaluation plan

GOAL \_\_\_\_\_

OBJECTIVE \_\_\_\_\_

What is working?	What needs to be improved?	What needs to be done?	Person responsible	Date completed by

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## CONTACT INFORMATION

If you have any questions about the Workplace Wellness Toolkit or require assistance in planning, implementing or evaluating your comprehensive workplace health program, please email: [workplace.wellness@york.ca](mailto:workplace.wellness@york.ca)

You can also contact **York Region Health Connection** at 1-800-361-5653, TTY 1-866-252-9933

Visit:

[York Region Workplace Wellness website](#)

[The Regional Municipality of York website](#)

### Did you find this toolkit useful?

Please provide us with some [feedback!](#)

## LINKS TO ADDITIONAL RESOURCES

For more information on workplace wellness, please visit the following websites:

[The Health Communications Unit – Comprehensive Workplace Health Promotion \(CWHP\) Resources](#)

[The Regional Municipality of Halton](#)

[Health Canada – Environmental and Workplace Health](#)

[Canadian Centre for Occupational Health and Safety](#)

[Institute for Work and Health](#)

[Industrial Accident Prevention Association](#)

While the York Region Community and Health Services Department provides a listing of community resources, it recommends that you independently research the resource(s) to determine its appropriateness for your own organization.