Steps to Creating a Healthier Organization

Understanding Workplace Health

Work-Life Balance

Forming a Wellness Committee

Gaining Organizational Commitment

Creating an Action Plan

Assessing Needs

Halton REGION

Ontario

ACKNOWLEDGEMENTS

This resource kit was originally adapted in 2004 with permission from the Central East Workplace Health Network Guidebook – Wellness Works: A Guide to Building a Healthy Workplace and the Heart Health Hamilton-Wentworth Guidebook – How to Get Started: Your Guide to Building a Healthy Workplace.

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OVERVIEW

This toolkit has been created to assist organizations in developing workplace health programs. The kit outlines the steps involved in setting up a workplace health program, and includes resources to assist you. The information provided is based on best practices in workplace health.

The Halton Region Health Department offers information that will help improve and maintain the health of your organization including employees and their families. The Health Department also has resources on a variety of topics which are available for distribution within your organization. The website offers easy access for employers and employees to information on:

- Healthy workplace activities
- Work-life balance
- Active living
- Healthy eating
- Smoking cessation
- Hosting healthy meetings

To take advantage of what is available please go to the Halton Region website at www.halton.ca/workplacehealth. There employers will find information about our Workplace Health Networking Meetings, how to subscribe to the quarterly "Working Well in Halton" workplace health posters and join the workplace health listserv.

For more information on workplace health, please contact the Halton Region Health Department at:

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GLOSSARY OF TERMS

Best practice – Best practices in health promotion are processes and activities that are consistent with health promotion values/goals and theories/beliefs. They are evidence based and are likely to achieve success in any given situation.[1]

Business case – The business case is the proposal you make to management, human resources, employees and unions to get commitment and participation to move forward with comprehensive workplace health programs. The business case includes evidence that supports the benefits of doing comprehensive workplace health promotion and the costs of doing nothing.

Buy-in – The term "buy-in" refers to obtaining support for comprehensive workplace health. Obtaining buy-in is an ongoing effort and is required from key stakeholders in your workplace, such as management, human resources, employees, and unions.

Comprehensive workplace health promotion – Comprehensive workplace health promotion is an approach to protecting and enhancing the health of employees that relies and builds upon the efforts of employers to create a supportive management culture and upon the efforts of employees to care for their own well-being.[2]

Health Promotion – Health promotion is the process of enabling people to increase control over and to improve their health.[3]

Organizational culture – Organizational culture refers to the social environment of the workplace as perceived and experienced by employees. The culture is defined as "a set of organizational and job factors that deal with the interaction between people, their work, and the organization".[4]

Policy - Policies define and support particular values and behaviours. If implemented well, policies can greatly influence the way people live and the choices that they make. In terms of health promotion, policies should make healthier choices easier and unhealthy ones more difficult.[5]

Return on investment (ROI) – Return on investment refers to the income generated from investing in comprehensive workplace health.

Stakeholders – Stakeholders are those people/groups within the organization that need to buy-in and support the workplace health program in order for it to be successful. Some examples of stakeholders are management, human resources, employees, and unions.

Work-life balance - Work-life balance refers to the challenge many people experience when trying to balance the demands of work and home. Work-life balance is one aspect of comprehensive workplace health and is greatly influenced by the culture of the organization.

1

Understanding Workplace Health

Why workplace health?

Benefits of workplace health

Workplace health strategies

What is a healthy workplace?

How long does it take to see the benefits of workplace health?

Key elements to successful workplace health programs

Evidence that workplace health programs work

1 Understanding Workplace Health

1.1 Why workplace health?

With over 17 million Canadians spending more than one-half of their waking hours at work, many companies are beginning to examine the health of their workplace. It is wise business practice to have programs in place to help create and maintain a healthy workplace. "Integrating workplace and human resource practices into the business strategy of the organization is often regarded as a key ingredient of success."[6]

Research shows the workplace itself has a direct impact on the health of its employees. Both the physical environment and culture of the organization influence the health of the employees. "A healthy organization is defined as one whose culture, climate and practices create an environment that promotes both employee health and safety as well as organizational effectiveness."[7]

Today's job force is changing. Work environments are becoming more stressful, which affects the health of employees, families, communities, and the health care system. As the workforce ages, there is a shortage of skilled employees. A commitment to workplace health from organizational leaders will help organizations attract and retain top performers, allowing them to remain competitive and to be recognized as an employer of choice.[8,9]

1.2 Benefits of workplace health

A focus on workplace health benefits employers, employees, and the community. Organizations implementing workplace health programs benefit from:

- reduced absenteeism
- reduced benefit costs
- higher employee morale satisfaction
- happier and healthier staff
- improved corporate image
- lowered insurance costs
- reduced staff turnover
- increased productivity and job
- increased organizational effectiveness

Employees working in organizations that place a high value on workplace health can experience the following benefits:

- improved health
- increased energy
- decreased risk of injury and/or illness
- increased job satisfaction
- increased ability to balance work and family responsibilities

1.3 What is a healthy workplace?

There are three factors that influence the health of an organization and its employees, as illustrated in the figure below.[10,11,12]

PHYSICAL ENVI-RONMENT

INDIVIDUAL HEALTH PRAC-TICES

HEALTHY WORKPLACE

ORGANIZATIONAL CULTURE
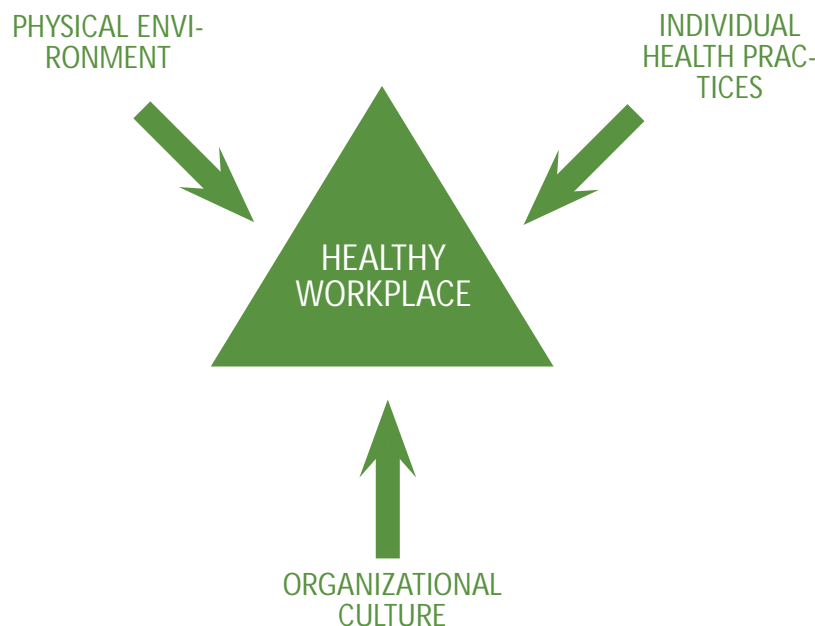
1. PHYSICAL ENVIRONMENT – The physical environment is often addressed through Occupational Health and Safety efforts. Workplace initiatives addressing the physical environment help to prevent workplace injury, illness, and disability.

Some examples of workplace initiatives may include:
- ergonomically designed workstations
- ensuring that stairways are safe and well-lit
- health and safety training, such as first aid training or hazardous material training

2. INDIVIDUAL HEALTH PRACTICES – By providing opportunities and encouraging employees to make healthy choices, workplace health initiatives can help to improve or maintain the health of employees.

Some examples of workplace initiatives may include:
- ensuring healthy food choices are available in the cafeteria and/or vending machines
- providing physical activity programs during breaks and/or the lunch hour
- supporting smoking cessation efforts

3. ORGANIZATIONAL CULTURE – Organizational culture refers to the social environment of the workplace as perceived and experienced by employees. The culture is defined as a set of organizational and job factors that deal with the interaction between people, their work, and the organization.[13] Another commonly used term to describe the culture of the organization is the psychosocial environment.

Some examples of factors affecting organizational culture include:
- employee recognition programs
- flexible work arrangements
- employee training & development opportunities
- staff involvement in decision making

The most effective workplace health program is comprehensive in approach, and addresses all of these factors.

1.4 Workplace health strategies

To help reach the goal of creating a healthy workplace, programs are most effective when a combination of the following strategies are used to address the factors influencing workplace health.

Awareness raising, education and skill building - activities that give employees information needed to help make healthy lifestyle choices (e.g. newsletters, educational sessions)

Environmental support - a work environment that makes it easy to make healthy choices (e.g. on-site physical activity centre, healthy cafeteria food choices)

Policy development - workplace guidelines that support healthy lifestyle choices (e.g. healthy meeting policy, family friendly policy)

The following chart provides sample strategies for each of the factors influencing workplace health.

FIGURE 1: STRATEGIES TO ADDRESS WORKPLACE HEALTH FACTORS
Adapted from The Health Communications Unit at the Centre for Health Promotion, University of Toronto

STRATEGIES	WORKPLACE HEALTH FACTORS		
	Physical environment	**Individual health practices**	**Organizational culture**
Awareness raising/ education	Raise awareness of health risks associated with hazardous materials	Provide information on bulletin boards, intranet, newsletter, etc. about the benefits of physical activity	Educate employees about the importance of effective communication
Skill building	Provide training on how to respond in an emergency	Provide a session with a qualified instructor on proper stretching techniques	Provide training sessions on communication skills
Environmental support	Provide necessary equipment to safely handle hazardous materials	Provide shower and change facilities to help encourage physical activity in and around the workplace	Conduct performance reviews on an annual basis
Policy development	Implement a policy stating all employees must complete WHMIS course annually	Develop a flexible work arrangement policy to allow employees to be active before work, after work or during lunch	Implement a policy stating that all employees must participate in an annual performance review

1.5 Key elements of successful workplace health programs

Workplace health programs must recognize the complex nature of today's workplaces. There are nine key elements that need to be considered when planning a successful workplace health program.[14]

1. Senior management involvement
Evidence of enthusiastic commitment and involvement from senior management will help employees to understand their employers' serious commitment to health.

2. Participatory planning
Workplace health planning needs to be undertaken in partnership with the workforce. Employees from all levels of the organization should be actively engaged in the health and management aspects of any workplace health initiative.

3. Primary focus on employees' needs
A successful workplace health program meets the needs of all employees regardless of their current level of health and recognize the needs, preferences, and attitudes of different groups of participants. Program designers need to consider the major health risks in the target population, the specific risks within the particular group of employees, and the organization's needs.

4. Optimal use of on-site resources
Planning and implementation of initiatives should optimize use of on-site personnel, physical resources, and organizational capabilities. For example, whenever possible, initiatives should use on-site specialists in such areas as health and safety, management, work organization, communication, and human resources.

5. Integration
An overall workplace health policy should be developed. The policies governing employee health must align with the corporate mission, vision, and values supporting both short and long-term goals.

6. Recognition that a person's health is determined by an interdependent set of factors
Any health initiative must address the multiple components of an individual's life. For example, their lifestyle and their work environment.

7. Tailored to the specific features of each workplace environment
Workplace health initiatives must be responsive to the unique needs of each workplace's procedures, organization, and culture.

8. Evaluation
Evaluation must include measurement and outcomes both in terms of employee satisfactions and bottom line business benefits.

9. Long-term commitment
To sustain the benefits of the initiative, the workplace must continue the initiative over time, while adapting the programs to ongoing personal, social, economic, and workplace changes.

1.6 Demonstrating the need for workplace health programs

There are many statistics that demonstrate the need for implementing workplace health programs.

- Excluding vacation and maternity leaves, Canada lost 100 million workdays for personal reasons in 2010, up from 85.2 million workdays in 2001 (Statistics Canada for Sept 2010). Using an average weekly pay rate of $853.19 and assuming a five-day working week and a daily rate of $171.00, the cost was about $17.1 billion in 2010.[15]

- Each smoker costs Canadian employers $3,396.00 more every year than non-smokers (estimated total cost of absenteeism, decreased productivity, and providing smoking facilities/area).[16]

- Smokers miss an average of 2 days more per year than non-smokers.[17]

- Work was cited by 39% of Canadians as a source of serious stress. Work was second only to financial problems as a cause of stress, and far ahead of health problems, parenting concerns, or relationships.[18]

- Older workers aged 55-64 average twice as many sick days as their younger counterparts.[19]

- Canadians are experiencing extreme levels of stress due to conflict between their work and their home.[20]

The implementation of workplace health programs can help to decrease the costs associated with poor employee and organizational health.

1.7 Evidence that comprehensive workplace health programs work

The evidence that comprehensive workplace health programs are cost-effective and improve employee health is growing.[21]

- Benefits such as increased employee satisfaction and retention as well as decreased absenteeism and injuries have been demonstrated in Canadian companies such as Amex, Celestica, Dofasco, MDS Nordion, NCR, and Telus BC.[22]

- Canada Life in Toronto showed a Return on Investment (ROI) of $3.40 on each corporate dollar invested on reduced turnover, productivity gains, and decreased medical claims.[23]

- Lighthouse Publishing, a small organization with 46 staff, realized a saving of $6,000 on health premiums with only a $2,000 investment in a workplace health and wellness program.[24]

For more evidence on the effectiveness of workplace health programs, refer to the Business Case for comprehensive workplace health in Appendix 1.

1.8 How long does it take to see the benefits of workplace health?

Workplaces implementing workplace health programs can see the following benefits:[25]

- Positive changes in your workplace, such as employees engaging in healthy activities during work hours, are usually seen within a few months.

- Within one year, front-line managers should see evidence of increased job satisfaction, commitment to work, and improved productivity among workers, resulting in increased customer satisfaction as well.

- It will take at least three years before an organization sees any significant quantitative improvements in health-related costs.

It is important to understand that the benefits seen from implementing workplace health programs take time, but are well worth the investment.

2 Achieving Work-life Balance

Benefits for the employer

Overcoming challenges to implementing work-life balance initiatives

How are workplaces responding?

Why is work-life balance a concern for employers?

What is work-life balance?

2

Achieving Work-life Balance

> "Slow down and enjoy life. It's not only the scenery you miss by going too fast – you also miss the sense of where you are going and why". **Eddie Cantor**

2.1 What is work-life balance?

Work-life balance refers to the challenge many people experience when trying to balance the demands of work and home. Work-life balance is one aspect of comprehensive workplace health and is greatly influenced by the culture of the organization.

2.2 Why is work-life balance a concern for employers?

When employees' work-life balance is compromised, the consequences can affect an employer's "bottom line". Without work-life balance policies and practices in place, employers may experience:

- higher rates of absenteeism
- lower productivity
- a negative impact on recruitment and retention

With one in four Canadians reporting that their work responsibilities interfere with their ability to fulfill their home responsibilities[26], it makes sense for employers to implement programs that address work-life balance for their employees.

2.3 How are workplaces responding?

Employers are responding to work-life balance by offering family-friendly workplace practices. Some practices can be offered at no or minimal cost to the employer, for example[27]:

- allow a gradual return to work after a parental leave
- permit employees to call their children after school and/or elderly dependants at home
- provide home shopping services for employees
- organize support groups concerning parenting and/or elder care
- provide a listing of child care providers

Some other examples of family-friendly workplace practices that employers can offer include:

- flexible work arrangements – these could be flexible work hours, part-time work, compressed work weeks or working from home (telecommuting)
- Employee Assistance Programs (EAP) – services to help employees deal with stress. Some EAP providers may refer employees to information and services about parenting and elder care
- child care options – child care subsidy or an on-site child care centre
- discretionary leave – with or without pay to allow employees to manage the personal aspects of their lives
- sick days that can be used for family or personal reasons

See Appendix 2 for a list of 57 ideas for work-life balance initiatives, generated from interviews with Alberta employers and written accounts of Canadian companies.

No matter what types of family-friendly initiatives an employer decides to make available to employees, it is critical that senior management support the policies and practices that have been put in place. Prior to this happening, senior management must support work-life balance as an important component of the organization's business plan and "buy-in" to work-life balance **(Appendix 3)**.

2.4 Benefits for the employer

With work-life balance initiatives or family-friendly workplace practices in place, employers can experience many benefits, (some of which are similar to the benefits of workplace health – **see section 1.2**) including[28]:

- attraction and retention of top employees
- improved employee motivation and loyalty
- reduced lateness and absenteeism
- lowered error and injury rate, reduced compensation claims, less illness
- recognition of your company as a community citizen, which can be a valuable business asset

2.5 Overcoming challenges to implementing work-life balance initiatives

The main challenge for employers offering work-life balance initiatives is putting the policies into practice. Below are some considerations[29] for employers:

- Conduct a needs assessment (**see section 5.0**) with your employees to find out what types of work-life balance initiatives would appeal most to them

- Integrate the work-life balance program with other workplace health initiatives within your organization

- Ensure work-life balance initiatives (such as flex time) are implemented as consistently as possible across the organization, acknowledging that there may be some positions for which these types of arrangements will not work. Some work may need to be reorganized or modified

- If employees are working fewer hours (e.g. job sharing or working part-time), workloads need to be adjusted accordingly so that employees do not feel pressured to get the same amount of work done in less time

- For employees who work from home, consider your responsibilities as an employer including equipment, ergonomic set-up of your employees' home offices, and expenses incurred while working from home

- Find ways to keep employees who are using flexible work arrangements (including working from home) connected to what is happening in the office so that they feel that they are part of the team

- Consider how to compensate for overtime for those employees who have alternate work arrangements, such as part-time and job sharing

- For employees working part-time and job sharing, consider if and/or how benefits will be provided

- Consider how alternative work arrangements will affect seniority (e.g. will credit be given for equivalent to full-time work?)

- Evaluate your efforts to determine the effectiveness of the practices put in place and fine-tune the program as needed

The culture of the organization greatly influences the ability for employees to balance their work and home responsibilities. A culture that is family-friendly views family issues as an opportunity to develop new ways of working. An effective organizational culture includes supportive supervisors and managers, who place a high value on their staff. Managers and executives are encouraged to live balanced lives and to lead by example.

3

Gaining organizational commitment

3 Gaining organizational commitment

3.1 Identifying key players

In order to create a healthier workplace, it is important that everyone in the organization is working towards a common goal. Here are some key organizational "players" who need to support the workplace health program:

MANAGEMENT / BUSINESS OWNERS

It is essential for management to be supportive of the program and be prepared to:

- Respond to the issues identified by employees
- Support the development of a comprehensive workplace health strategy: that is, promote activities that create awareness, build skills, and create supportive environments
- Provide appropriate resources. Staff must be given the time, within their workday, to participate in the planning and implementation of activities. The program must also be supported with appropriate resources, including people, material, and money. This time and resource allowance will not only help boost program participation rates, but will illustrate to staff management's commitment to the program[30]

UNIONS/EMPLOYEE ASSOCIATIONS

Unions must buy-in to the concept of workplace health and see the benefits of a program for its members. It is important to involve employee groups as active partners in the process of building a healthy workplace from the very start.

EMPLOYEES

Grass roots involvement and participation is critical to the success of the program. You can promote commitment and buy-in by actively involving employees from the start. This could include staff from occupational health, health and safety, human resources, benefits, and/or training and development departments as well as from the general employee population.

OTHER KEY STAKEHOLDERS

You might also want to consider involving company suppliers, customers, and family members of employees, as their health and satisfaction help to contribute to an overall healthy organization.

3.2 Integrating workplace health programs

Occupational health and safety specialists, workplace health practitioners, managers, and human resource staff often work in isolation of one another. While many of their goals and objectives are identical, each group often takes a different approach to the issues and develops separate strategies to deal with them. As a result, there is a high potential for duplication of effort and valuable resources within the organization.[31]

The varied issues, needs and concerns of both employees and the organization are met more successfully when approached in a comprehensive and integrated fashion.[32] An integrated approach includes a structure to bring together key individuals responsible for aspects of workplace health. Mechanisms must be established to bring these strategic players together. Once these players are together, issues pertaining to employer commitment, or any other issues related to workplace health, can clearly and consistently be addressed.[33]

3.3 Implementation Strategies

• Identify a workplace health champion(s) within your organization. Find individuals (managers, union representatives, employees, occupational health, health and safety staff, etc.) who will champion workplace health in the workplace. Obtain support and commitment from them.

"Just as important as strong leadership is the presence of a 'champion' in the workplace to advocate for the organization's health and safety strategy…
As an important builder of trust and confidence among staff, the champion must be empowered by management to enact the company's strategy, and he or she must be able to communicate well with people."[34]

• **Present the "business case" for workplace health to key employee groups (management, unions, etc.).** The business case **(Appendix 1)** presentation should include information on the importance of developing workplace health programs and your plan for promoting workplace health within the organization.

• **Create a letter of commitment.** Once all parties have agreed on the need and process for the workplace health program, it is important to have them sign a formal letter of commitment **(Appendix 4)**. The letter should:

1. Outline the degree of commitment
2. Identify each person's role and responsibility
3. Establish a timeline for implementation
4. Express a willingness to respond to needs identified by employees
5. Express a willingness to provide needed resources

This letter should be signed by management, employee representatives, unions and other key stakeholders.

3.4 Progress checklist:

- Is your organization prepared to establish a workplace health program?

- Is your organization willing to find out the needs/interests of employees?

- Is your organization prepared to respond to the workplace health needs and interests of employees?

- Is senior management committed to playing a visible, ongoing, and participatory role in the program?

- Is the union/employee association supportive of the workplace health program?

- Has a letter of commitment been signed between all of the key parties?

4

Forming a Wellness Committee

Implementation strategies

Terms of Reference

Committee members

Progress checklist

Creating a vision

Role of the Wellness Committee

Meetings

4 Forming a Wellness Committee

4.1 Role of the Wellness Committee

The formation of a workplace Wellness Committee is an important step in building a healthy workplace. The role of the Wellness Committee is to:

- provide workplace health leadership and direction
- promote communication between employees and management
- recruit staff volunteers and build support for initiatives
- identify needs and concerns
- oversee the planning, implementation, and evaluation of the workplace health program

4.2 Committee members

The committee should have broad representation from all employee occupational groups, departments, employee age groups, and reflect the overall make-up of the organization. This will support buy-in from employees for the process.

Examples of Wellness Committee members:

- Management
- Employee representatives
- Health and safety staff
- Administrative support
- Unions/employee associations
- Training and development staff
- Marketing and communications staff
- Other key stakeholders

Your organization may decide to form a new committee or work with an existing committee, such as a Joint Health & Safety Committee, to address workplace health needs.

Participation in the committee should be voluntary. Group members should be committed and enthusiastic about workplace health. This committee will be the driving force behind your workplace health initiatives.

Wellness Committee Chair
It is important to have a committed person lead the Wellness Committee. You may choose to hold a nomination process for Chair and this person will carry out this role for a specified period of time, or you may choose to have a rotating Chair role (e.g. Chair position rotates through the

Committee membership alphabetically at each meeting). It is the Chair's responsibility to ensure that all members of the committee are working well together. As part of his/her duties the Chair will:

- ensure that the committee creates and adheres to Terms of Reference
- draft the agenda for meetings
- ensure minutes are recorded and distributed to management and committee members
- ensure that everyone has an opportunity to speak and be heard at meetings
- guide individual committee members to work toward a common goal
- resolve conflict and misunderstandings that relate to the workplace health program

4.3 Terms of Reference

Once the committee is formed, it is important to set Terms of Reference **(Appendix 5)** for the committee members (e.g. roles; frequency and duration of meeting; how decisions will be made) and establish a goal statement to communicate the intention and direction of the committee to employees.

4.4 Meetings

The committee, through the development of the Terms of Reference, will determine when and how often it needs to meet. Usually committees meet more often during the initial stages of development of the workplace health program. There should however, be a minimum number of meetings that are planned in a given year. For scheduling reasons, it is beneficial to plan these well in advance with clearly identified objectives. An agenda **(Appendix 6)** should be circulated prior to a meeting and minutes **(Appendix 7)** from all meetings should be taken.

4.5 Creating a vision

A vision statement is a way for your Wellness Committee to set a direction. As your Wellness Committee begins to plan and implement activities, your vision statement will act as a guide, helping you to: allocate resources, define new directions, stay on course over time, avoid distractions, and market your activities. In essence, your Wellness Committee will be able to reflect every decision it makes against this vision.

4.6 Implementation strategies

- **Promote and establish the Wellness Committee membership.** You will need to find ways within your organization to promote the need for membership on your Wellness Committee. Make presentations, put up posters, use your e-mail system, talk to people individually – all of these are examples of how you can recruit members. Be sure your committee is a manageable size (8-12 employees) and that it is as representative as possible of the groups within your organization.

- **Establish how information will be distributed and shared.** It is important to ensure that minutes are recorded for each Wellness Committee meeting. These minutes should be circulated to committee members and to management.

4.7 Progress checklist:

- Does the committee include a broad selection of members including management, union, occupational health and safety, and human resources?

- Has a Chair been determined for the committee?

- Has a Terms of Reference been developed for the committee?

- Does the committee have regularly scheduled meetings?

- Do you have a vision statement that will act as a guide as you develop your workplace health program?

- Do management and employees support the vision statement? Is it addressed or reflected in other strategic planning, policies, and/or programs that exist in the organization?

- Does the committee keep minutes of meetings that include records of decisions, actions, and progress?

- Does the committee communicate with employees, management, and the union on an on-going basis?

- Is management regularly updated on committee progress and activities?

5 Assessing Needs

Implementation strategies

Assessment tools

Progress checklist

Benefits of assessing needs

Baseline data

Assessing

current initiatives

5
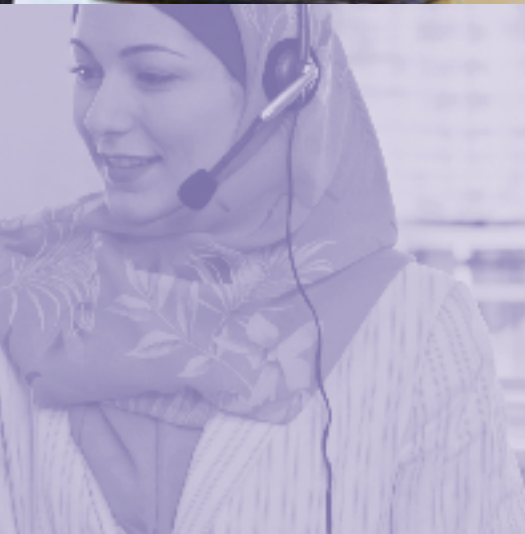
Assessing Needs

5.1 Benefits of assessing needs

If a workplace health program is going to be successful, it has to reflect what employees consider to be important. Employee "buy-in" can be promoted by actively involving employees in the creation of the workplace health program and by addressing the needs, interests, and concerns of all employees.
The results of the needs assessment will provide the Wellness Committee with information concerning the workplace health needs in terms of the three factors that influence health in the workplace: physical environment, individual health practices, and organizational culture (**see section 1.3**).

A needs assessment is a process used to identify the gap between what currently exists and what is desired.

The benefits to conducting a needs assessment are:
- identification of employee and organizational needs
- justification for programming and financial support
- consultation with employees about their needs fosters employee's ownership and commitment to programming
- information collected can be used as baseline data to measure changes at a future date

5.2 Assessment tools

Focus groups and employee surveys are the most common ways of assessing employee needs and interests. Each method has both advantages and challenges. Your organization should choose the method that is most appropriate for your needs and available resources.

FOCUS GROUPS

Focus groups are formal, facilitated discussions with 8-12 employees on a specific issue. Focus groups can be used to collect in-depth information relating to workplace health programs and services that are of need or interest to employees.

ADVANTAGES	CHALLENGES
• Can obtain in depth information and clarify employee responses • Promotes employee buy-in • Can be implemented at a reasonable cost	• Can be time consuming • May be difficult to reach all employee groups • Will require work to set-up and implement meetings and analyze the information collected (e.g. meeting minutes) • Quality of information is dependent on skills of the facilitator/moderator • Potential for participants to influence one another's opinions

The steps involved in conducting a focus group are[35]:

1. Clarify purpose of group - Why conduct a focus group? Who are the stakeholders? Who is the population of interest? What issues need to be explored?
2. Assess resources to conduct group - What external resources will you need? Which in-house resources can you make use of?
3. Decide on methods and procedures - What is the total number of groups needed? What is the desired composition of the groups?
4. Write moderator's guide - Decide on main questions of interest
5. Recruit focus group participants
6. Coordinate logistics - Location, time, and budget
7. Facilitate focus groups
8. Analyze focus group data - Preparation of the data, programs available for analysis
9. Interpret and disseminate results
10. Take action

When developing focus testing questions, keep the following in mind[36]:

- Focus on "need to know", not "nice to know"
- Questions should be general in nature, with some probes to stimulate discussion when necessary
- Limit the number of questions to 10-12 for a two hour focus group

EMPLOYEE SURVEYS

Survey questionnaires can be used to collect information related to workplace health and may identify issues including possible strategies to address them.

ADVANTAGES	CHALLENGES
• Reaches a large number of employees • Provides a lot of information • Promotes confidentiality – employees may be more comfortable disclosing concerns • Information can be used to evaluate workplace health program • Can be used to recruit interested employees for workplace health initiatives, including Wellness Committee representatives • Promotes employee buy-in and involvement	• Time consuming • Does not provide in-depth information • Responses are not always representative of employee types • Needs to be well promoted • Will require work to set up and implement survey, tabulate data, and evaluate information • Could be costs associated for conducting a survey and tabulating it by an outside agency • Ensuring employees complete and return surveys

There are a variety of needs assessment survey types which can be used to collect information relating to workplace health:

- Health interest survey – collects information regarding the health interests of employees (e.g. types of programs employees would participate in if offered)
- Health risk appraisal – collects information on the need for health programs (e.g. data collected indicates that employees need to be more physically active)
- Job satisfaction – collects information relating to employees perception of the culture of the organization (e.g. assesses whether employees communicate openly and regularly with their direct supervisor)

When assessing the needs of your employees, you may choose to use one of the above types of needs assessment surveys, or a combination.

5.3 Assessing Current Initiatives

Before planning new programs for your organization, it is a good idea to take an inventory of the types of initiatives you currently offer. This inventory is sometimes called an environmental scan.

ADVANTAGES	CHALLENGES
• Identifies what currently exists and gaps in current programming	• Provides information from the organization's perspective, not the employees' perspective • Does not identify wants/needs/preferences of employees

5.4 Baseline data

It is important to track information and statistics that relate to employee health, such as long-term disability rates, compensation claims, and absenteeism, before planning your program. Baseline data can be used to help you track the progress of your workplace health program and evaluate its effectiveness. It might be helpful to compare data from your organization with your industry's average.

Listed below are some examples of data that can be obtained from your Human Resource department. It should be noted that there are other influences that may impact Human Resource data (such as company layoffs, environmental hazards) that may influence the health of your workplace. For this reason, the information you collect should be assessed over the long-term and should only be used as an estimate, as it may not be an accurate reflection of the success or failure of your workplace health efforts.

Suggested Human Resource data:
- Absenteeism rates
- Workplace Safety and Insurance Board statistics
- Benefit costs
- Prescription drug claims
- Short- and long-term disability statistics
- Disability leave/sick days
- Staff turnover
- Demographics (e.g. sex, age, education, ethnicity, language, etc.)
- Grievances
- Company surveys (e.g. employee satisfaction, quality of work-life)
- Organizational data from a parent/sister company
- Insurance health benefit information (compared to other organizations)

5.5 Implementation strategies

- **Select a method(s) for collecting employee health information.** Consider how you will ensure that the information collected is representative of your organization (e.g. department, age, cultural background). Also consider how to reach those "hard to reach" groups (e.g. employees with different literacy levels).

  Is there a need to ensure confidentiality or anonymity (e.g. if the survey contains personal health information) when collecting information? If yes, have you communicated how confidentiality will be maintained? Employees may provide more honest answers if they believe that information will be held in confidence.

- **Develop a communication plan for the promotion, distribution and collection of the assessment tool.** (**Appendix 8**) The more employees that participate, the more accurate your results will be. Consider providing incentives to encourage employees to complete the assessment tool. This will help to increase the response rate.

  When implementing a survey, the response rate should be 50% or more. If the response rate is less then 50%, you may wish to use other forms of information collection (e.g. focus group interviews or meetings) to verify survey results and fill in gaps.

- **Conduct the employee assessment.** Consider attaching a covering letter (**Appendix 9**) signed by key stakeholders (senior management, union, etc.). This letter should describe your workplace health program, the reasons for conducting the survey, support from stakeholders, and any plans to share the information once it is collected.

- **Create a Workplace Health Profile and share the document.** (**Appendix 10**) Take the time to put all of the information you have gathered from the needs assessment into a report. Find ways to share the whole report or highlights with management and employees. At this point you may wish to conduct group feedback sessions with some employees to ensure that the information collected accurately reflects employees' interests and concerns. Your Health Profile should contain some preliminary recommendations to consider for your workplace health program.

- **Develop a plan to continue to collect information.** Continue to collect and monitor company statistics on a yearly basis. Plan on re-doing your assessment every few years. This will allow you to compare results over time and identify any new or existing issues.

5.6 Progress checklist:

- Did you market the value of the needs assessment to employees?

- Did you consider the timing of the assessment in terms of conflicts with other major events (e.g. holidays, labour negotiations)?

- Did you identify and account for those "hard to reach groups" of employees (e.g. shift work, varying literacy levels)?

- Did you have an accompanying letter of support from management, unions, and other key stakeholders?

- Did you provide an incentive for employees who participated (e.g. prizes)?

- Did a sufficient number of employees respond to the assessment (e.g. at least 50% of employees)?

- Is the assessment representative of your organization? Have any employee groups been missed (e.g. department, age group, sex, job classification, language)?

- Did you gather baseline data from Human Resources?

6

Creating an Action Plan

Implementation strategies

Creating your action plan

Progress checklist

Purpose of

the action plan

6

Creating an Action Plan

6.1 Purpose of the action plan

The action plan is a detailed description of how employee and organization needs are going to be addressed. The Wellness Committee can translate the results of the needs assessment results into an action plan **(Appendix 11)**.

By having an action plan, the Wellness Committee can justify resource allocation and demonstrate accomplishments when objectives are achieved.

Features of the action plan should include:

- Program goals
- Objectives to be achieved
- Programs or activities that will be offered to employees as a means to achieve the objectives
- How the programs or activities will be evaluated
- The timeframe in which programs or activities will take place
- Estimated cost of programs
- The individual(s) on the Wellness Committee responsible for taking the lead

The plan should be revisited periodically to check on progress and to determine if any modifications need to be made.

6.2 Creating your action plan

Your action plan should outline the following:

- **Goals** – Goals are statements of broad, long-term accomplishments expected from the program. Goals should be clear, time-limited, and stated in such a way that it is easy to determine whether or not they have been achieved.[37]

  What do you want your activities to accomplish? Create a list of what you want to achieve that will address your issue.

- **Objectives** – Objectives are statements of expected short-term accomplishments related to one or more program goals.[38] **(Appendix 12)** Objectives specify the desired impact or effect of the program (i.e. how much of what should happen to whom by when).

What are the expected results of your activities? If your goal was to increase staff's knowledge related to work-life balance, how will you know if your strategies have accomplished this?

For each activity, create a list of what you want to accomplish.

Objectives should be **SMART:**   **S**pecific
                                    Measurable
                                    Achievable
                                    Realistic
                                    Time-limited

These expected results will help you to measure the success of your initiatives.

- **Target Audience** – Who is the activity designed for?

- **Activities** – What activities will allow you to accomplish your goals? Review the information collected about employee needs and interests. What activities are needed or are of interest to employees?

Remember that activities should be comprehensive (create awareness, build skills to allow for behaviour change, and create a supportive environment – **refer to section 1.4**). Successful activities are: meaningful to employees, easy to manage, simple, efficient, innovative, flexible, low cost, supported by take home materials, and customized to fit the workplace. Remember to include strategies that encourage attendance and participation.

- **Resources** – What resources are needed to put the activities into place? Create a list of people, information, supplies, facilities, money, materials, and time you will need to make your activities work. What existing community resources are available to you?

- **Timelines** – When should the activity be up and running? Provide specific dates.

- **Person(s) responsible** – Who will take responsibility for the completion of this activity? Identify the Wellness Committee member who is responsible.

- **Evaluation** – How will you monitor your activities? Choose a monitoring/evaluation method that will allow you to identify and track your expected results. For example, if your expected result was to have 25% of your staff attend a stress management class, you may track this by using attendance sheets. As a committee you must decide what information is most important for you to track and to determine if your wellness initiatives are a success. Ideally your program should evaluate how activities progress (process evaluation) and what outcomes are achieved (outcome evaluation).

6.3 Implementation strategies

- **Review your Workplace Health Profile and identify common issues, themes, or findings.** You may wish to have individuals from the Wellness Committee review the information separately and then share their findings with the group to see if people draw similar conclusions.

- **Rate the issues, themes, or findings according to importance or priority**. One way to do this is to think about the capacity your Wellness Committee and your workplace has to address an issue. Then think about how addressing this issue will bring you closer to your vision. Develop a list of issues from most important to least important.

- **Create an overview of the new project.** By creating an overview of your new project **(Appendix 13)**, it allows your Wellness Committee to assess the feasibility of the new program before creating your action plan.

- **Create an action plan.** Your plan should:
  - meet the needs of all employees regardless of their current level of health, literacy, ethnicity, social, and skill backgrounds
  - strike a balance between what the employee and employer can do
  - address employee concerns
  - be kept confidential until approved by the Wellness Committee, management, and other key stakeholders
  - be shared with all employees once approved
  - be short, easy to read, and updated regularly as needed[39]

- **Implement and continually market your plan.** Continue to keep staff informed as you implement workplace health initiatives.

6.4 Progress checklist:

- Is the action plan based on the results of the needs assessment?

- Does the plan include recommendations for implementation in the short and long-term? Are the recommendations appropriate and achievable?

- Is the plan comprehensive? (see section 1.4)

- Has the Wellness Committee approved the plan?

- Has management approved the plan and have they committed time and resources to see it implemented? Do you have visible commitment from senior management?

- Have you communicated the plan to all employees?

- Have you considered methods to evaluate your activities?

- Did you develop an ongoing marketing/communication plan to encourage participation in activities?

7

Evaluating Your Program

Types of evaluation

Measuring success

Progress checklist

Implementation strategies

Why evaluate?

7 Evaluating Your Program

7.1 Why evaluate?

Evaluation is an extremely important component in your efforts to create and maintain a healthy workplace. Evaluation can be used to[40]:

- Collect evidence on the effectiveness/impact of a program
- Demonstrate accountability to stakeholders: management, unions, employees
- Identify ways to improve a program
- Determine what works, what doesn't work, and why
- Assess the needs of target audience
- Improve the usefulness of program materials
- Compare programs with other similar programs
- Assess the efficiency of a program (cost-benefit analysis)

Evaluation should be an on-going process and needs to be built into the action plan. The information you collect will help you modify your workplace health program to meet the needs of your employees and to justify continuing or expanding your activities.

7.2 Measuring success

It is important to measure your activities to find out if they are a success. A review of your progress can help you answer a number of important questions:

- What are the ongoing workplace health issues within the organization?
- What activities can be implemented that will have an impact on workplace health?
- Are activities accomplishing the goals you have set?
- What is working and what is not?
- What changes need to be made to improve activities?
- Have the needs of employees changed?

If programs are not having success, it is important to find out why and get back on track. When developing evaluation questions, it is important to phrase questions to ask how you did in the past, not how you are going to do something in the future.[41] It is also important to relate evaluation back to your program goals and objectives. Did you meet your objectives? If not, why not?

A program ready to be evaluated must have[42]:

- Defined goals and objectives
- Clearly specified success indicators and outcomes
- Clearly defined audiences/target(s)
- Well defined activities
- Organization structure that can support the collection of information

7.3 Types of Evaluation

There are two types of evaluation: process and outcome.[43]

Process evaluation examines the procedures and tasks involved in implementing a program. Process evaluation includes such things as[44]:

- Tracking quantity and description of people who are reached by the program
- Tracking quantity and types of services provided
- Descriptions of how services are provided
- Descriptions of what actually occurs while providing services
- Quality of services provided

Process evaluation can be used to answer the following questions:

- How many people participated?
- Were the materials developed appropriate for members of the work force? (e.g. literacy, message content, design/layout)
- Who participated?
- What did they think of the activity?
- What could be improved upon?
- Would these people participate again?
- Does the program address differences in age, sex, and occupation?
- Were there incentives to attend?
- How was the program promoted?

There are a number of different ways of monitoring or evaluating the process. Some examples include:

attendance lists, participant and/or instructor evaluation forms, employee questionnaires/surveys, group or individual in-depth interviews, and pre-testing of program materials.

Outcome evaluation measures the effect or impact activities have on the people who participate. It seeks to answer the question "Did the program meets its stated goals and objectives?" Outcome evaluations can assess both short-term outcomes (immediate changes in individuals or participants, such as participant rates, awareness, knowledge, or behaviour) and long-term outcomes (sometimes referred to as impact evaluation). An outcome evaluation can also analyze the results in relation to the costs of the program (cost-benefit evaluations).[45]

Outcome evaluations include such things as[46]:

- Changes in attitudes, knowledge, or behaviour
- Number of people participating
- Cost-benefit analysis – Evaluates the program in terms of costs. It measures both the program costs and the results (benefits) in monetary terms. This means that the results of the program or benefits must be translated into a dollar value
- Cost-effectiveness analysis – In this type of evaluation only program costs are expressed in monetary terms. Benefits are expressed only in terms of the impacts or outcomes themselves (they are not given a dollar value). Interpretation of this type of analysis requires stakeholders to decide if the benefit received is worth the cost of the program or if there are other less expensive programs that would result in similar or more benefit
- Changes in policy
- Impact assessments – Evaluates the impact your program had on the participants or other stakeholders of the project. It measures outcomes but also measures what changes occurred as a result of those outcomes

Outcome evaluation can be used to answer the following questions:

- What did employees learn and/or how much do they remember?
- Was there a knowledge, attitude, and/or behaviour change (e.g. has a smoking policy and cessation program changed the number of employees that smoke)?
- Is there reduced absenteeism, injury rates, lost time?
- Which group had lower absenteeism (e.g. those that took the stress management program or those that did not)?

There are a number of different ways to monitor or evaluate outcomes. Choose a method that allows you to best measure your "expected results". Some examples include: surveys (e.g. before and after, group feedback), individual or group interviews, evaluation forms assessing knowledge, attitude and behaviour changes, environmental audits of workplace health policies and programs, collection and analysis of changes in statistics (e.g. EAP program usage data, WSIB claims, absenteeism claims).[47]

7.4 Implementation strategies

- **Reflect.** What is working well? What elements need to be improved? What needs to be done to improve the situation? Who will be responsible for getting it done? When will it be done? **(Appendix 14)**

- **Refine and keep going.** You are now ready to begin the cycle again. You have probably learned some valuable lessons and may be ready to tackle some different priority issues. Make sure to take time to celebrate and share your successes with everyone in your workplace.

7.5 Progress Checklist*:

- Is evaluation on-going and built into the action plan?
- Is there a plan for both process and outcome evaluation?
- Did you choose an evaluation method? i.e. group feedback, surveys
- Did you identify what needs to be modified/changed based on evaluation results?
- Did you communicate the evaluation results to employees, management, etc.?
- Did you assign a person to be responsible for program changes based on evaluation results?
- Did you assign a timeline to complete the changes by?

* To access this Progress Checklist in Word for your own use, please refer to the CD Rom included as part of this toolkit.

Appendices

Minute Template

Letter of Commitment

Agenda Template

Action Plan

57 Winning Work-
Life Balance Ideas

Business Case

Template

Manager Buy-In

Appendices

Appendix 1: Business Case Template
See section 1.6 and 3.3 for more information

The Case for Comprehensive Workplace Health Promotion (CWHP)

"A healthy workplace is as good for business as it is for the individuals working there."

Health Canada Corporate Health Model, 1996

What is Health?

Health is a state of complete **physical, social and mental well-being**, and not merely the absence of disease or infirmity. Health is a resource of everyday life, not the objective of living. It is a positive concept emphasizing **social and personal resources as well as physical capabilities.**

World Health Organization

Why Workplace Health?

- Canadians spend 2/3 of their day at work
- Employment/Working Conditions is a determinant of health (Health Canada)
- Creating a healthy workplace fosters a work environment that is conducive to high levels of performance (Conference Board of Canada, 2000)

Mission/Vision Statement

- Insert organization's mission/vision statement
- Link to workplace health

Why invest?

- Job mobility, retention & attraction
- Aging workforce
- Shortage of skilled employees
- Stressful work environments
- Increasing workplace health costs

Source: Brock University, Workplace Health Research Unit

Benefits of CWHP

Improved
- Corporate image
- Employee health

Reduced
- Absenteeism
- Employee turnover
- Disability/health care costs
- Risk of injury and/or illness

Increased
- Productivity
- Job satisfaction
- Employee morale

Direct Business Costs
Absenteeism

- Average absenteeism rate = 8.5 days in 2001 (up from 7.4 days 5 years earlier)
- Using an average weekly pay of $663.17, and a daily rate of $133, cost of absenteeism = $11.3 billion in 2001

Source: Stats Canada & CCIH (2002): Discussion Paper on Workplace Health

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Direct Business Costs
Income Replacement

$35, 100	Average yearly salary
x 100	100 employees
x .071	STD, LTD, WSIB costs

$249,210 for 100 employees

Source: Watson Wyatt Worldwide (2000)

Direct Business Costs
Rising Health Benefits Costs

- Canadian Life and Health Insurance Association (CLHIA) made health benefit payments of $12.5 billion in 2000. In 1990, these costs were $5.9 billion.
  Source: CCIH (2002): Discussion Paper on Workplace Health
- Prescription drug costs increased 45% from '96 to '00

Source: BCE Emergis

A Business Concern
Employee Health Risks

Corporate Concerns - Key Health Risks
National Wellness Survey Report 2000

	Stress	Smoking	Work-Family Balance	Lack of exercise	Lack of job control
Percentage of Respondents	83.1	57	55.3	55.1	53.1
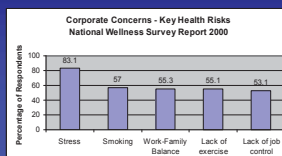
What is a Healthy Workplace?

Physical Environment

Individual Health Practices

Healthy Workplace

Organizational Culture

Physical Environment

Healthy Workplace

A healthy physical environment helps to reduce work related injury, illness & disability.

Individual Health Practices

Healthy Workplace

Workplaces can support the health of their employees by providing opportunities for individuals to improve or maintain their health.

Organizational Culture refers to the social environment as perceived and experienced by employees.

Healthy Workplace

Organizational Culture

The most effective workplace health promotion is comprehensive, and addresses all of these factors.

Physical Environment

Individual Health Practices

Healthy Workplace

Organizational Culture

Strategic Approach

- 1. Establish a healthy workplace committee
- 2. Identify workplace health values & goals
- 7. Monitor & Evaluate
- •Organizational needs
- •Evidence/research
- •Organizational values & goals
- 6. Implement Program
- 3. Conduct Situational Assessment
- 5. Plan Program
- 4. Set Priorities & Objectives

Conditions for Success

- ■ Senior management involvement
- ■ Participatory planning
- ■ Primary focus on employee's needs
- ■ Optimal use of on-site resources
- ■ Integration of workplace health with corporate mission, vision and values
- ■ Tailoring to the workplace environment
- ■ Evaluation
- ■ Long-term commitment

Source: The Health Communication Unit (THCU)

CWHP Works

A 1997 review of 365 studies (Craig-Evans, 1999) concluded that many health promotion programs were able to produce changes in knowledge and health risk behaviours specifically in four key areas.

1. Fitness levels
2. Eating habits
3. Job/life satisfaction
4. Alcohol and illicit drug use

Canadian Successes

- NCR Canada has seen a 30% decrease in absenteeism rates per employee since the introduction of its program Health First.
- Dofasco has seen a decrease of 60% in lost time injury frequency over the past 8 years.

  Source: NQI

Canadian Successes

- BC Hydro
  - ↓ $1.2 Million/year sick leave costs
    $97,000/year in accident costs
    $35,000 in WCB rate

  - ↑ $919,000 in productivity gains

  Source: Health Canada Active Living at Work website

Canadian Successes

- MDS NORDION
  - ↓ 90% annual grievances
    33% absenteeism
    80% lost-time injuries

  turnover 40% lower than industry rate

  Source: Health Canada, Active Living at Work website

"There is a growing body of evidence that the case for a healthy workplace must be positioned within the context of achieving excellence and as an investment in not just the health of employees but in the long-term health of the organization."

Dan Corbett, NQI

Appendix 2: 57 Winning Work-Life Balance Ideas
See section 2.3 for more information

57 Winning Work-Life Balance Ideas

This section presents a cross-section of ideas taken from interviews with Alberta employers and written accounts of Canadian companies. They are presented in no particular order. The ideas range from simple to complex, routine to wonderfully creative. Each one, taken alone, is a positive step that you can take to help you and your employees stay on the "upside" of work-life balance.

1. Casual dress Fridays
2. Lunchrooms, to encourage people to meet and eat together
3. More relaxing (home-like) furnishings in a gathering area
4. Furnishings, decorations, or points of interest (e.g. fish tank) that cause people to "take a breather"
5. Employee bulletin boards for posting personal notes or requests (e.g. TV for sale, seeking carpool partners)
6. Personal space rooms (e.g. retreat with a minor illness)
7. Generously proportioned couches for naps
8. Private phone rooms or booths to make personal calls
9. Breakfast at company expense
10. No responses to emails requested on weekends
11. No meetings between 8 and 9 a.m., leaving the first hour of the day free to catch up on work and with co-workers
12. No meetings every second Friday, allowing people to get more done and free up their weekends
13. Scheduled breaks in the workday – middle, beginning or end of the day
14. Social events or mixers to strengthen at-work friendships
15. Family events to strengthen family/work connections, understanding and support
16. Workplace tours, videos, photo diaries or "bring your child to work days" to help family members understand and support the employees' work commitment
17. Grandparents' day off to spend with grandchildren
18. Provide day care and after-school care at the work site
19. On-site fitness centres, opening fitness centres to family members
20. Subsidies or passes to local fitness centres
21. Bringing wellness into the workplace (e.g. massage therapists, yoga)
22. On-site convenience store
23. On-site rink, walking trails, basketball court, barbecue
24. On-site dry cleaning service
25. On-site cyber café

26. Free staff parking
27. Taxi vouchers or bus fare for unplanned overtime
28. Concierge services (e.g. shopping, pet walking, housecleaners, or contractors)
29. Automobile pickup and servicing
30. Dinner brought in for unplanned overtime
31. Bulk discounts for ski passes
32. Discounts on any company products
33. Brokered discounts at popular retail outlets, restaurants, clubs, or for car insurance
34. Tuition reimbursements or subsidized living costs while employees are at school
35. Scholarships for children of employees
36. Low-interest loans
37. No-interest loans
38. Paid memberships in community associations or local teams
39. Limits to mandatory overtime
40. Eliminate travel on Sunday to allow families to be together for a full weekend
41. Eliminate mandatory Saturday night layovers for business trips
42. Pay for employees to take a spouse along on a business trip
43. Learning or wellness accounts
44. Tickets to local theme parks, ballet, sporting events
45. Company picnics, dinners, parties, golf tournaments
46. Work/family account (a set amount to spend as they see fit)
47. Pay for lessons not related to work
48. Pay for meals or a housekeeper for a grieving family
49. A thank-you card to an employee
50. A thank-you card to the employee's family
51. Well-behaved pets in the workplace
52. On the spot "good work" awards
53. Work schedules that align with the bus schedule
54. Policy that employees must take vacations
55. Paid leave each month or each year to a volunteer
56. Volunteering together as a work team
57. "Dollar for doers" – charitable contributions earned by volunteer work

Appendix 3: Manager Buy-In: 10 Paths to Enlightenment
See section 2.3 for more information

Manager Buy-In: 10 Paths to Enlightenment

1. **Hire the right people.** Recruit managers who are committed to achieving business goals without overtaxing employees or work teams, and who have good listening skills.

2. **Provide the skills through training,** reference materials, coaching or mentoring, to ensure managers know why and how to support work-life balance. Investing in these tangible supports will tell managers that your company is serious about work-life balance.

3. **Provide the tools** such as information brochures, proposal templates, criteria for evaluating employee proposals, and checklists for implementing a program.

4. **Provide the systems** to support the program and measure its results, such as opportunities for staff to provide feedback, data collection and analysis services, and avenues for managers to ask questions and seek advice in overseeing flexible work arrangements.

5. **Give them authority** to make decisions that will support work-life balance for individuals or for the work unit. These might be on-the-spot decisions (allowing an employee to leave early) or the right to turn down a project that will strain the resources of the work unit.

6. **Give them latitude** to find a better or different way to improve work-life balance for employees and to be creative in how they interpret and apply the flexible working arrangements.

7. **Make them responsible** to "own" the decision by directly approving or communicating decisions to employees about work-life balance applications.

8. **Make them accountable** for setting targets (e.g. for participation in work-life balance programs, for results such as reduced absenteeism) and include the targets in position descriptions and performance agreements.

9. **Recognize and reward achievements.** For example, tie performance bonuses to supports for work-life balance or establish annual awards for work units that meet targets for both productivity and work-life balance.

10. **Celebrate successes.** Feature case studies, publish stories and communicate gains and benefits of work-life balance in company newsletters, on the intranet, or at company-sponsored events.

Appendix 4: Letter of Commitment - Sample
See section 3.3 for more information

Letter of Commitment

We, the undersigned, are committed to fostering comprehensive workplace health promotion at (Place Name of Your Organization Here) by:

1. Acknowledging the importance of the formal establishment of a Wellness Committee and the need for ongoing support and resources for its activities.
2. Actively participating in the assessment and identification of our workplace strengths and health issues.
3. Offering environmental supports and skill building opportunities for staff to improve their individual health as well as the overall health of the work environment.
4. Supporting the development, implementation, and ongoing evaluation of healthy workplace policies.
5. Making a long-term commitment of both time and resources to creating and sustaining a healthy and supportive work environment.

	Signature:	Date:
Management	_____	_____
Union/Employee Groups	_____	_____
	_____	_____
	_____	_____
Human Resources	_____	_____
Coordinating Agency	_____	_____
Community Partners	_____	_____
Other	_____	_____
	_____	_____

Adapted with permission from Muskoka/Parry Sound Health Unit's Letter of Commitment

Appendix 5: Wellness Committee Terms of Reference - Sample

See section 4.3 for more information

Wellness Committee Terms of Reference

Vision
Our vision is to support a workplace culture which allows employees to reach and maintain optimal health.

Mission
To develop, implement, and evaluate a comprehensive workplace health program within a supportive culture, thereby supporting and enhancing the health and well-being of our employees.

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

Membership
The Committee will consist of not more than ten members and will include representatives from: management, unions/employee associations, employees, health and safety staff, and administrative support. Committee membership will be reviewed on an annual basis.

Wellness Committee Values
We value respect and 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 roles and responsibilities as laid out below.

Roles & Responsibilities
Chair:
The Chair of the Wellness Committee will be a member of the committee and will be determined through an annual nomination process.

The Chair will:
- Draft the agenda
- Ensure that all committee members have an opportunity to speak and be heard at meetings
- Guide committee members to work toward a common goal
- Resolve conflict and misunderstandings that pertain to the workplace health program
- Share meeting minutes with management team

Participants:
- Prepare for meetings in advance by reviewing the agenda
- Ensure any assigned action items from previous meetings have been completed
- Be prompt and regular in attendance. Send regrets in advance to the Chair
- Confine your discussion to the topic
- Provide constructive feedback and receive it appropriately
- Listen generously and critically to others

Minute Taker:
- The minute taker will rotate alphabetically
- Clearly identify action items and person responsible in the minutes
- Distribute the minutes to committee members upon completion

MEETINGS
Meetings will be held on the third Wednesday of each month or at the call of the Chair. There will be a minimum of nine meetings per year.

A minute taker will be determined at the beginning of each meeting and they will be responsible for recording and distributing the minutes for that meeting.

DECISION MAKING PROCESS
When making decisions, the Wellness Committee will strive for consensus. Consensus is defined as being able to live with, accept, and support a decision, when there is not total agreement. If consensus cannot be reached, majority vote will be taken.

APPROVED
(date)

Adapted with permission from the Halton Region Health Department

Appendix 6: Agenda Template
See section 4.4 for more information

Agenda

1.0   Call to Order

2.0   Approval of Minutes

3.0   Agenda Additions

4.0   Business Arising

-
-

5.0   Subcommittee Updates or other organizational committee updates
- Training and Development
- Healthy Eating
- Promotions

6.0   New Business

-
-

7.0   Next Meeting

8.0   Adjournment

Appendix 7: Minute Template
See section 4.4 & 4.6 for more information

Minutes of Meeting:

Date:

Present:

Regrets:

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

Adapted with permission from the Halton Region Health Department

Appendix 8: Communication Plan Template
See section 5.5 for more information

Communication Plan

Goal:

Objectives:

Target Audience: Who are you trying to reach?	Vehicles & Channels: How are you going to reach them?	Key Messages: What do you want to say?	Tasks: What needs to be done?	Timeline: When is it going to be done by?	Evaluation: How do you know if you have made a difference?

Adapted with permission from the Halton Region Health Department

Appendix 9: Needs Assessment Cover Letter - Sample
See section 5.5 for more information

Needs Assessment Cover Letter

TO: All Staff

FROM: Management

DATE:

RE: Workplace Health Survey

_____

Workplace health programs benefit both employees and employers. By improving our health, not only do we feel better, but we can be more successful both at home and at work – and that benefits everybody.

All employees have been asked to complete the attached survey. It should take between 15-30 minutes to complete. Although participation is voluntary, your response gives you an opportunity to influence the workplace health program. Information from this survey will be compiled and incorporated into a report that will provide recommendations for workplace health initiatives that will help to improve the health of all employees.

By answering the questions in the survey, you can help provide an overall picture of employee health needs and interests.

- All information is anonymous. You cannot be identified. Do not write your name on this survey.
- Your participation is voluntary.
- There are no right or wrong answers.
- If a question makes you feel uncomfortable, you do not have to answer it.

Instructions:

- Please read each question carefully, and answer as accurately and honestly as you can.
- Use a pencil so you can erase any answers you want to change.
- When finished, place your survey in the envelope provided and return to:

_____

I encourage all staff to take the time to fill out the survey. All levels of management support this initiative, and will provide time for you to complete the survey. Your time and effort will benefit both you and our organization.

If you have any questions regarding the survey, please contact: _____

Adapted with permission from the Regional Municipality of Halton

Appendix 10: Workplace Health Profile Contents
See section 5.5 for more information

Workplace Health Profile Contents

1. Table of Contents

Since the Health Profile will be shared with employee groups, including management, it is important to be as organized as possible.

2. Executive Summary

Outline the key points from the Health Profile to help gain the approval for the implementation of workplace health programs.

3. Wellness Committee Members

Include the names and signatures of Wellness Committee members to demonstrate their support and commitment.

4. Wellness Committee Mission Vision

Highlight the direction of the Wellness Committee **and/or**

5. Demographics

Provide information on the demographics of employees completing the needs assessment, demonstrating that the results are representative of your organization.

6. Key Findings

Present key findings from the data collected during the needs assessment.

7. Recommendations

Provide recommendations to address the key findings from the needs assessment. You may choose to include preliminary timelines and resources required for each recommendation.

8. Concluding Remarks

Outline the next steps in the process of creating a workplace health program.

9. Appendices

Attach any relevant documents or materials mentioned in the Health Profile. This may include a copy of the needs assessment tool.

Appendix 11: Action Plan Template
See section 6 for more information

Action Plan

Goal:

Objectives:

Activity	Lead	Task Item	Start Date	Target Finish	Estimated Resources	Evaluation

Adapted with permission from the Halton Region Health Department

Appendix 12: How to Write Objectives
See section 6.2 for more information

How to Write Objectives

When writing your program objectives, make sure they are SMART: Specific, Measurable, Achievable, Realistic, and Time-limited.

To help you write objectives, try using the framework below:

To (check ☑ one only):

☐   increase

☐   decrease

☐   investigate

☐   implement

☐   other (specify):_____

(what [1])_____

by ☐ _____% ☐ _____

in/for (whom [2])_____

by (when) _____

[1] e.g., awareness, behaviour, environmental support, policy, etc.

[2] e.g., management, all employees, shiftworkers, etc.

Example objectives:

- To implement a healthy cafeteria program by September 2012.

- **To decrease by 12% the number of respondents who feel their present level of activity is unsatisfactory by August 2012.**

- To offer six educational opportunities to all employees on health topics by May 2012.

Appendix 13: New Program Plan Template
See section 6.3 for more information

New Program Plan

Program Name:

Date:

Lead Staff:

Goal:

Objectives:

Brief Overview of Program:

Target Audience:

Rationale for Program:

When is the program being offered?
- outside of work hours?
- during work hours?

Where is the program being offered?

Frequency of program:

Duration of program:

Estimated Budget:
- 100% organization paid
- 100% employee paid
- cost shared (e.g. 50% employee paid/50% organization paid)

Resources Required:

Type of strategy:
- awareness raising, education, and skill building
- environmental support
- policy development

Adapted with permission from the Halton Region Health Department

Appendix 14: Evaluation Plan Template
See section 7.4 for more information

Evaluation Plan

Goal:

Objectives:

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

Appendix 15: Sample Program Plan – Job Sharing

Program Planning Process Overview

Section 5

Needs Assessment

- Conduct focus group or employee survey
- Obtain baseline data
- Review current initiatives

Section 5.4
Appendix 6

Workplace Health Profile

- Demographics
- Key findings
- Recommendations

Appendix 12

New Program Plan

- Goals/objectives
- Brief overview
- Target audience
- Rationale for program
- When program offered
- Location
- Frequency/duration
- Budget
- Resources required
- Type of strategy

Section 6
Appendix 9

Action Plan

- Goals/objectives
- Target audience
- Activities
- Resources required
- Timelines
- Person(s) responsible
- Evaluation

Appendix 6

Communication Plan

- Target audience
- Vehicles and channels
- Key message
- Tasks
- Timelines

```
                    ┌─────────────┐
                    │   Program   │
                    │Implementation│
                    └──────┬──────┘
                           │
                           ▼
Section 7          ┌─────────────┐        • What is working?
                   │  Evaluation │        • What needs to be improved?
                   └──────┬──────┘        • What needs to be done?
                          │               • Person responsible
                          ▼               • Date completed by
                   ┌──────────────┐
                   │Modify Program│
                   │ (as needed)  │
                   └──────────────┘
```

Program Implementation

Section 7   Evaluation

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

Modify Program (as needed)

New Program Plan

Name of Project: Job Sharing

Date: Month; Date; Year

Lead Staff: H.R. Manager (Jane Smith)

Goal: To allow interested employees the opportunity to participate in job sharing as part of an alternate work arrangement (where possible).

Objectives:
1. To have a job sharing policy developed by the end of June 2005.
2. To communicate the job sharing option to employees by August 2005.
3. To offer training to all supervisors and managers on how to work with employees enrolled in an alternative work arrangement, particularly job sharing, on an annual basis.

Brief Overview of Program: Job sharing will be made available as an option (where possible) for our employees in positions where a full-time complement is still required to do the job but the employee desires reduced hours of work.

Target Audience: All employees.

Rationale for Program: The results of the latest employee satisfaction survey indicate that 14% of employees are interested in job sharing opportunities. By offering job sharing as an option, it will help to increase job satisfaction, thereby positively affecting employee productivity.

When is the program being offered?
- during work hours

Where is the program being offered? N/A

Frequency of program: N/A

Duration of program: N/A

Estimated budget: N/A

Resources Required: Information posted on Intranet and in "Let's Connect" internal newsletter.

Type of strategy:
- policy development

Action Plan

Goal: To allow interested employees the opportunity to participate in job sharing as part of an alternate work arrangement (where possible).

Objectives:
1. To have a job sharing policy developed by the end of June 2005.
2. To communicate the job sharing option to employees by August 2005.
3. To offer training to all supervisors and managers on how to work with employees enrolled in an alternative work arrangement, particularly job sharing, on an annual basis.

Activity	Lead	Task Item	Start Date	Target Finish	Estimated Resources	Evaluation
Policy development	H.R. Policy Analyst (Joe Smith)	Research similar policies Create draft policy Review draft policy with union representatives and senior management Facilitate approval by senior management	Jan 2005	June 1, 2005		Review policy every two years with employee groups and modify as needed
Develop a communication plan	Communications Officer (Alex Turner)	See attached Communication Plan	Jan 2005		Printing costs	
Offer training to supervisors and managers	Training & Development Officer (Mae Grant)	Determine educational needs (e.g. consult with managers, literature search) Research training options Propose training options to senior management for approval Select training dates Promote training dates to supervisors and managers Register supervisors and managers for training sessions	Jan 2005	Ready for delivery July 2005		Evaluation form completed by all training participants

Communication Plan

Goal: To allow interested employees the opportunity to participate in job sharing as part of an alternate work arrangement (where possible).

Objectives:
1. To have a job sharing policy developed by the end of June 2005.
2. To communicate the job sharing option to employees by August 2005.
3. To offer training to all supervisors and managers on how to work with employees enrolled in an alternative work arrangement, particularly job sharing, on an annual basis.

Target Audience: Who are you trying to reach?	Vehicles & Channels: How are you going to reach them?	Key Messages: What do you want to say?	Tasks: What needs to be done?	Timeline: When is it going to be done by?	Evaluation: How do you know you have made a difference?
All employees	Intranet Internal "Let's Connect" newsletter Senior management monthly meetings	Job sharing is now an option for employees, based on certain conditions	Prepare text. Approach Technical Services and Communications for inclusion of material onto the Intranet and into the newsletter	July 1, 2005	# hits on intranet # inquiries # staff participating in program
External candidates applying for positions	Part of job posting for job sharing positions (company website, newspaper ads)	Work for a company that supports job sharing as an option for employment	H.R. to confirm job sharing status with manager posting the position	July 1, 2005	
Supervisors and managers of staff using alternative work arrangements, particularly job sharing	On the agenda for monthly senior management meetings "Let's Connect" newsletter Intranet listing of corporate courses	Supportive supervisors help increase employee satisfaction and productivity	H.R. to include job sharing as part of the supportive supervisor course (with its particular challenges) Forward information to Technical Services and Communications (Intranet & newsletter)	July 1, 2005	

Evaluation Plan

Goal:
To allow interested employees the opportunity to participate in job sharing as part of an alternate work arrangement (where possible).

Objectives:
1. To have a job sharing policy developed by the end of June 2005.
2. To communicate the job sharing option to employees by August 2005.
3. To offer training to all supervisors and managers on how to work with employees enrolled in an alternative work arrangement, particularly job sharing, on an annual basis.

What is working?	What needs to be improved?	What needs to be done?	Person responsible	Date completed by
Including alternate work arrangement policy information, including job sharing, in job postings	Understanding of alternate work arrangements by new staff	Create an alternate work arrangement information package to be given to all new hires	H.R. Policy Analyst (Joe Smith)	Nov 2005
		Survey staff about their satisfaction with the new alternate work arrangement policies in the next employee satisfaction survey	Training & Development Officer (Mae Grant)	Jan 2006
Registration for training sessions using on-line registration	Participation is low due to not enough notice for upcoming training dates	Promote upcoming training a minimum of 2 months in advance to accommodate busy schedules. Send out reminder e-mails 1 week in advance to participants	Training & Development Officer (Mae Grant)	Sept 2005

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