



Worksite Wellness Team Guide

How to Successfully Lead Your Worksite
Health Improvement Efforts



Welcome to The Wellbeing Partners!

Your company has partnered with The Wellbeing Partners to bring health improvement to your worksite. Several tools and resources are available to make sure that your program is as successful as possible.

In addition to this guidebook, access other supporting materials on the website. There are member tools available through the portal, and using your company's membership log in.

Your time and energy spent serving on your company's Worksite Wellness Committee/Team is an important success factor.

Contact us:

Community Engagement Center – Room 228,
University of Nebraska at Omaha 6001 Dodge Street ,
Omaha , NE , 68182

(402) 934-5795

thewellbeingpartners.org

info@thewellbeingpartners.org

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What is a Worksite Wellness Program?

A worksite wellness program or initiative is an organized program for employees designed to enrich their physical, mental, emotional, occupational, and spiritual wellbeing. The purpose of the program is to create a supportive work environment for positive health behaviors of employees, thereby reducing their risk of developing chronic diseases. The concept of wellness, however, goes beyond reducing disease and includes promoting and supporting improved wellbeing for all employees. The role of the employer in a worksite wellness program is to create a culture and environment that supports healthy behaviors among employees.

The key components of an effective worksite wellness program include:

- management support in the form of resources, time, and participation.
- data collection to help establish key indicators of success to support the vision and mission of the wellness program.
- wellness team that is representative of the employee base to plan, implement, guide, and support the program.
- operating plan with measurable goals and objectives to provide structure to the program and guidance for the wellness team.
- interventions that are appropriate for the needs and interests of the workforce.
- communication strategy to ensure the wellness message is effectively communicated to all employees.
- evaluation of the key indicators to determine program implementation was a success.

What is a Wellness Team?

Establishing, supporting, and maintaining a worksite wellness team provides opportunities for all employees to help:

- create a healthy worksite.
- foster collaboration and partnerships.
- establish healthy lines of communication between support staff, supervisors, middle, and upper management.

The size of your wellness team will vary depending on the size of your organization. Anywhere from four to twelve members is typically a manageable size. It is important to have representation from all areas of the organization including remote locations. Consider members of existing committees such as safety or activity committees, which would allow for cross promotion opportunities.

Characteristics of wellness team members include:

- respected and trusted by fellow employees.
- dependable and reliable.
- personal interest in health.
- sincere desire to help others enhance their quality of life.
- available to meet regularly with the team.
- willingness to promote the importance of health and wellness program around peers and co-workers and to encourage worksite wellness program participation.

Defining Wellness Team Roles and Responsibilities

Wellness team members are part of a team tasked with leading the wellness program at the worksite.

At a minimum, this team:

- meets formally several times throughout the year and plans activities to promote good health for all employees.
- represents employees from all levels and from all departmental areas and locations and all staff are eligible to join.
- communicates health-related information and activities to employees throughout the company.
- seeks input from fellow employees.
- encourages employee participation in health-related initiatives and events.
- advocates for worksite policies and environments that support healthy living.
- monitors and evaluates the worksite health improvement program.
- serve as wellness leaders/champions for the program.

Depending on structure and available staffing, the team could work to create overall program design, implementation, and evaluation through the following:

- identify gaps in current wellness programming and services.
- prioritize program needs through assessments.
- recommend or take actions that will improve employee wellness.
- follow up to assure appropriate action has been taken.
- evaluate outcomes and recommend modifications to senior management team as needed.

Team members are expected to:

- participate in planning events and programs, assist at the events.
- keep informed of trends and best practices in worksite wellness programs.
- accept the duty and obligation to attend meetings because regular attendance is vital.
- serve on the team voluntarily.

To be an effective worksite wellness team, it is important to have a game plan, that is fluid, and that can be adjusted according to employees' needs, wants and participation level.

Consider the following steps to success:

Step 1: Identify committee/team members

Step 2: Get started

Step 3: Establish the team

Step 4: Gather employee input and interests

Step 5: Create a plan

Step 6: Update programs

Step 7: Evaluate programs

Step 8: Plan for future programs

Step 1: Identify Committee/Team Members

Determining who could and should serve on the wellness team is the first step. Keep in mind that the best approach is to select a representative group of people from various departments and levels within the organization. Any potential committee members should understand that they need to make at least a one-year commitment to serving. In some situations, it is a good idea to consider asking some to serve longer terms so that in future years, there is always someone with a prior history on the committee. Volunteers can be recruited or invited to serve.

Recruiting members

- Inform employees about the wellness team by placing announcements in high-traffic locations, through employee newsletters, e-mail, or other communications, asking for people to volunteer.
- Include an explanation of why it is important and what is in it for the wellness team member. Experiences include fun activities, that will be exclusive and that it is a way to have a voice in making positive changes at the worksite.

This approach will ensure that the committee has individuals who are committed to the idea rather than those that sign on because they feel obligated. If you fail to get enough individuals to volunteer or lack representation in certain areas, consider inviting members.

Inviting members

- The invitation should come either in person or by letter from company management. The invitation should explain what is involved. Give the potential member a chance to think about it, rather than asking for an immediate commitment. Therefore, provide a response deadline.

Once potential members are identified, it is important to get their supervisors' approvals so that supervisors understand and support the time that employees will need to dedicate toward serving on the wellness team.

Key Committee Considerations:

- **Committee/Team size** – The number depends on the organization's size and the diversity of departments. There should be at least four members so that the workload is not too overwhelming for members.
- **Committee composition** – Include committee members from key departments and representatives from various levels within the organization, including human resources, management, marketing, information technology and support staff.
- **Supervisor approval** – All committee members need supervisor support for the time and work they dedicate to the committee.
- **Job evaluation plan** – Committee members should include their new committee responsibilities on their annual job evaluation plan.

Committee/Team Members – Roles and Responsibilities

The committee needs certain roles and responsibilities to be defined so that members can work together effectively.

Suggested Roles or Formal Position for Wellness Team Members

Wellness Team Chair

- Creates the meeting agenda with input from other wellness team members; schedules meetings; leads meetings to ensure that all agenda items are covered in a timely manner.

Leadership Liaison

- Meets regularly with company leadership to get support/approval on plans and share ideas and concerns. Keeps leadership updated on wellness program participation/outcomes.

Secretary

- Takes minutes at each meeting. Distributes the minutes to team members and notes any follow up needed complete, with due dates.

Resources Liaison

- Looks for free or low-cost wellness related events in the community; recommends to the wellness team community events that the organization should consider promoting or participating in; research tools at the state and national levels to use and makes recommendations to the wellness team for their use in the program.

Events Coordinator

- Oversees the development of an events schedule that includes both internal and external offerings and ensures that all wellness areas are represented at events.

Communications Coordinator

- Oversees the development of regular wellness communication to employees, works with the events coordinator to promote events, uses multiple and consistent forms of communication to inform employees of wellness program opportunities.

Sharing responsibilities within the wellness team is important so that the work does not end up on the shoulders of one or two people. As needed, it may be necessary to think about creating other positions and/or sub-committees to handle the workload more effectively and efficiently.

Step 2

Schedule Meeting 1

Check with all committee members to select a time, date and place that works for everyone. The initial meeting may require more time than subsequent meetings. Allow at least two hours for the first meeting so you can be sure to cover all items effectively.

Step 3

Meeting 1 - Establish the Committee

A member of management or designated employee should start the first meeting since there is not a chairperson in place. This meeting is designed to get a sense of management's vision for wellness, go over expectations, assign roles, and develop a strategic plan and timeline.

Meeting Goals

- Overview of the worksite wellness committee
- Designate chairperson, program coordinator, and other roles
- Develop a mission statement
 - The mission statement should explain what the worksite wellness program is intended to accomplish and its value.
- Review The Wellbeing Partners materials and determine how to best utilize the resources and education available.
 - Introduce the worksite wellness Committee Plan (sample in appendix)
- Introduce an employee interest survey
 - The results of a survey can help the committee determine the short-term goals and/or strategies for the worksite wellness committee plan.
 - The committee determines the best method to distribute the survey within the organization or business. Options can include personally, via e-mail, placed in mailboxes, etc.
 - Determine who will deliver the survey. Options may be from internal sources or through a third-party such as a vendor.
- Schedule future meetings
 - The committee should decide how often to meet and how long each meeting should last. The committee may decide to hold a meeting every other month, monthly or even more frequently, depending on the number and timing of planned activities. The committee should meet at least once per quarter and the length of meetings vary.

Reminder: The newly designated chairperson should send meeting requests for future meetings. This can be done after the first meeting or a week or two before the next meeting. Minutes from the previous meeting should be included with the request.

Step 4

Meeting 2 - Gather Employee Opinions

At the second meeting, the committee starts tackling the to-do list. This meeting will focus on the employee interest survey, and incentive and work-time considerations.

Meeting Goals

- Determine how and when to distribute and collect the employee interest survey
 - This survey is key to engaging employees in the program. The committee needs to develop programs and activities that employees want and will participate in.
 - The committee needs to decide how to distribute the survey – through e-mail, an online survey vendor or printed copies.
 - Give employees at least a week to complete the surveys. If the survey is administered internally, employees should return the surveys to a designated committee member, giving that person enough time to compile the results before the next committee meeting.
 - It is a good idea to send out reminders a day or two before the survey deadline and then the day they are due.

The results of the survey are shared at the next committee meeting.

- Identify funds for incentives and materials
 - The chairperson should assign one or two committee members to meet with management on funding for incentives and resources.
 - Key questions include:
 - » Will management provide funding? If so, how much and how often?
 - » What type of reporting requirements will management require? Will the incentives be considered taxable income?
 - » Are there funds available from outside the organization? Grants? Community resources?
- Discuss current and potential worksite policy for wellness activities
 - The chairperson should assign one or two committee members to discuss wellness activity policy issues with management. These individuals may be the same ones who approach management regarding funding.
 - Some questions to ask:
 - » Is it possible to have activities during the workday? If not, when could/should activities take place?
 - » If activities during the workday are possible, who can/should approve time for activities during the workday? Immediate supervisor? Company president or officer?
 - » What, if any, restrictions might there be on activities? Time per activity? Number of activities per month or quarter?

Step 5

Meeting 3 - Create a Plan

Meeting Goals

- Review the employee interest survey and any additional data collected. Other data collected might include:
 - health risk assessments
 - culture audit
 - social determinants of health survey
 - other
- As a team, look at the aggregate reports to determine which areas employees are most interested in along with areas of interest with the greatest need.
- Identify short-term goals based on the survey results.
 - Usually, two or three topics emerge. These areas should become the committee's short-term goals.
 - The next step is to determine what tools, resources, programming, and activities can be offered in these areas.
 - It would be beneficial to designate a committee member to oversee each of the issues.
- Review long-term goals. Committee members who met with management should report to them what was discussed and what decisions were made.
 - Create a plan (sample in appendix)
 - » This worksheet will guide the committee through the year of programming. It captures the committee's mission statement and short- and long-term goals, complete with steps and strategies.
- Schedule follow-up meetings

Programming Considerations

Once a plan is in place, it is time to start the programs.

The committee should document the following for each activity:

- A brief summary of the program
- A list of those who participated (name and e-mail address if applicable)
- Pictures of the event to use to publicize future events
- The results of the program/activity survey (sample in appendix)
 - Develop a short evaluation that participants fill out at the end of each activity. The answers may prove valuable for future efforts and ultimate program success.

Tie all activity information back to the activity plan that was developed by the worksite wellness committee.

Step 6

Meeting 4 - Update Program Progress

Meeting Objectives:

- Review the committee plan progress. Determine the following:
 - Are strategies being implemented? If so, what is working? What is not?
 - Are employees motivated to participate?
 - Is participation having a positive effect on behaviors?
- Change or revise the activity plan as needed. From the progress report discussion, it may be necessary to change or revise the plan to be more effective at achieving the desired goals.
- Determine if new or additional strategies and steps should be taken and update the activity plan accordingly.

Step 7

Evaluate Program Progress

The second-to-the-last meeting for the year will cover much of the same topics as previous meetings. The only additional item for discussion will be to begin planning for the year-end evaluation.

Meeting Objectives:

- Determine the plan's progress
- Change or revise the plan as needed
- Decide on any new or additional strategies and steps should be taken
- Determine an overall, year-end evaluation plan
 - To gauge the success of year 1, the committee should:
 - » Since the next meeting will be the last for the year, the survey should be conducted before then and results discussed at that last meeting.
 - » The committee should decide when the surveys will be distributed, when they are due back, and when they will be compiled and by whom so that the last meeting can be spent reviewing the results.
 - Conduct an employee satisfaction survey (sample in appendix)

Year-end Evaluations

Keep in mind:

- The employee satisfaction survey is to be filled out by all employees, regardless of their participation in any wellness programs or events.
- Distribute the surveys at least a month before the last meeting and have all surveys returned two weeks before the final year-end meeting so that there is time to compile the results.

Step 8

Year-End Meeting: Planning for Future Programs

Meeting Objectives

- Complete the year-end evaluation summary (sample in appendix)
- Look at the plan, employee satisfaction surveys, and other data collected for the wellness program.
- Create Year 2 Plan.
- Schedule the first meeting for the upcoming year.
- Determine any timeline for committee members that may be rolling off the following year to ensure representation is maintained.

Make sure to compile all the information and documents from the first year – minutes, copies of surveys, survey reports and completed plans. Maintain records in an electronic format or create a location for any non-electronic items so that they are accessible for future events.

Appendix

- Worksite Wellness Committee Plan
- Sample Year End Evaluation
- Sample Letter Inviting Committee Participation
- Sample Program/Activity Evaluation
- Sample Employee Wellness Program Satisfaction Survey
- Sample Wellness Committee Meeting Agendas

Worksite Wellness Committee Plan

| | |
|--------------------|-----------------|
| START DATE | END DATE |
| MISSION STATEMENT: | |

| COMMITTEE MEMBERS | | |
|-------------------|--------|-------|
| Name | E-mail | Phone |
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |

| SHORT TERM GOAL(S) Focus: Individual/Group Activities and Environmental Changes | | | | |
|--|----------------|------------------------------|------------|---------|
| Goal 1 | Lead Member(s) | Communication with Employees | Start Date | Results |
| Step 1 | | | | |
| Step 2 | | | | |
| Step 3 | | | | |

It is best to start with two or three short-term goals.
Use the same table above for each short-term goal.

Worksite Wellness Committee Plan, Page 2

| LONG-TERM GOAL(S) Focus: Policy and/or Environmental Changes | | | | |
|---|----------------|------------------------------|------------|---------|
| Goal 1 | Lead Member(s) | Communication with Employees | Start Date | Results |
| Step 1 | | | | |
| Step 2 | | | | |
| Step 3 | | | | |

It is best to start with two or three long-term goals.

Examples of long-term goals might be to increase employees' use of the stairwells versus the elevator or replacing vending machine items with healthy selections.

Use the same table above for each long-term goal.



Year-End Evaluation:

Employee Satisfaction Survey Summary:

Recommendations for Next Year

Positive Lessons Learned:

Negative Lessons Learned:

Efforts/programs/activities to continue:

Efforts/programs/activities to discontinue:

New programs and activities to implement:

Sample Letter Inviting Committee Participation

<Date>

Dear <First Name>,

<Company name> has decided to undertake an important initiative. We would like to start a worksite health improvement program to help you and your fellow employees live happy, healthy lives by giving you the needed tools, resources, and support. This endeavor and ongoing commitment will mean making some changes both on the part of the company and individual employees.

We hope that you will help get this program started by accepting our invitation to serve on the Worksite Wellness Committee <indicate any term lengths if applicable>. The first meeting is scheduled for <date, time, and location>. Please check with your immediate supervisor to make sure that he or she approves of your participation in this new committee.

The Worksite Wellness Committee will help to promote healthy living to fellow employees by planning and communicating the various programs and activities to employees at our worksite, advocating for worksite policies and cultural changes that support healthy living, and managing and evaluating the various wellness programs.

Please consider serving on this important committee and let us know as soon as possible if you would like to help.

Sincerely,

<Designated Company Leader>

Include instructions on how to submit name for consideration.

There could be a section added at the bottom of the letter to capture a supervisor's signature as their support of the employee participation for the listed term.



Sample Activity Evaluation

<Activity name>

<Date of activity>

We want to know what you thought of this worksite wellness activity. Please take a moment to fill out this brief survey. You need not provide your name unless you would like to do so. Thank you for your time and input.

Indicate your level of agreement using the following:

1 = Strongly Disagree 2 = Disagree 3 = Agree 4 = Strongly Agree U = Unsure

- | | | | | | |
|---|----------|----------|----------|----------|----------|
| 1. This activity has influenced me to live healthier. _____ | 1 | 2 | 3 | 4 | U |
| 2. I would like to participate in similar activities in the future. _____ | 1 | 2 | 3 | 4 | U |
| 3. I would recommend this activity to others. _____ | 1 | 2 | 3 | 4 | U |
| 4. What was the best/most helpful part of this activity? | | | | | |

5. How could we improve this activity?

6. Check areas of interest for future activities.

- ☐ Physical Activity/Exercise
- ☐ Healthy Eating
- ☐ Stress Management or Resiliency
- ☐ Mental Wellbeing
- ☐ Sleep
- ☐ Healthy Relationships
- ☐ Please suggest others:

Please return the survey to:

<Name>

<Location>

Return by <Deadline Date>

Sample Employee Satisfaction Survey

The Worksite Wellness Committee would like to get your input on our program. Please take a few minutes to fill out this survey. You do not need to share your name unless you would like to do so. Your responses, along with those of your co-workers, will be used to develop our wellness activities and resources for the upcoming year.

1. Are you aware that our company had a worksite wellness program?

Yes No

2. Have you participated in any of the programs or activities?

Yes No

3. If you answered yes to question #2, how many programs or activities did you participate in? _____

4. Have you made any healthier lifestyle choices because of the wellness program?

Yes No

5. Would you participate in any future wellness programs or activities?

Yes No

6. If you answered yes to question #5, what areas would you be interested in?

☐

Nutrition

☐

Physical Activity

☐

Weight loss

☐

Stress Management or Resiliency

☐

Mental Wellbeing

☐

Relationships

☐

Please suggest others:

7. Overall, what did you like most about the wellness program?

8. What improvements could the company make to the wellness program?

Return to:

<Name>

<Location>

Return by <Date>

If you would be interested in serving on next year's Worksite Wellness Committee, please contact <Name> at <Phone number/e-mail address> by <Date>.

First Meeting – Sample Agenda

Worksite Wellness Committee

Meeting Agenda

Date:

Time:

| ATTENDEES | |
|-----------|--|
| | |
| | |
| | |
| | |
| | |

| ITEM | FACILITATOR |
|--|-------------|
| Call meeting to order | |
| Introduction | |
| Decide on Committee Name | |
| Develop Mission statement | |
| Committee Chairperson and Program Coordinator Selection | |
| The Wellbeing Partners Membership | |
| Overview of Plan and Surveys <ul style="list-style-type: none"> • Plan • Employee Interest Survey • Policy and Environment Survey | |
| Future Meeting Schedule | |
| Adjourn | |

Minutes and follow up (by when and by who)

Second Meeting – Sample Agenda

Worksite Wellness Committee

Meeting Agenda

Date:

Time:

| ATTENDEES | |
|-----------|--|
| | |
| | |
| | |
| | |
| | |

| ITEM | FACILITATOR |
|--|-------------|
| Call meeting to order | |
| Old business | |
| Employee Interest Survey Determine distribution and collection plan/timeline | |
| Management Issues <ul style="list-style-type: none"> • Funding and resource support • Policies regarding wellness activity participation | |
| Review/Confirm Schedule of Future Meetings | |
| Adjourn | |

Minutes and follow up (by when and by who)

<http://www.iowahealthieststate.com/>

Interventions supported by Iowa Healthiest State Initiative