

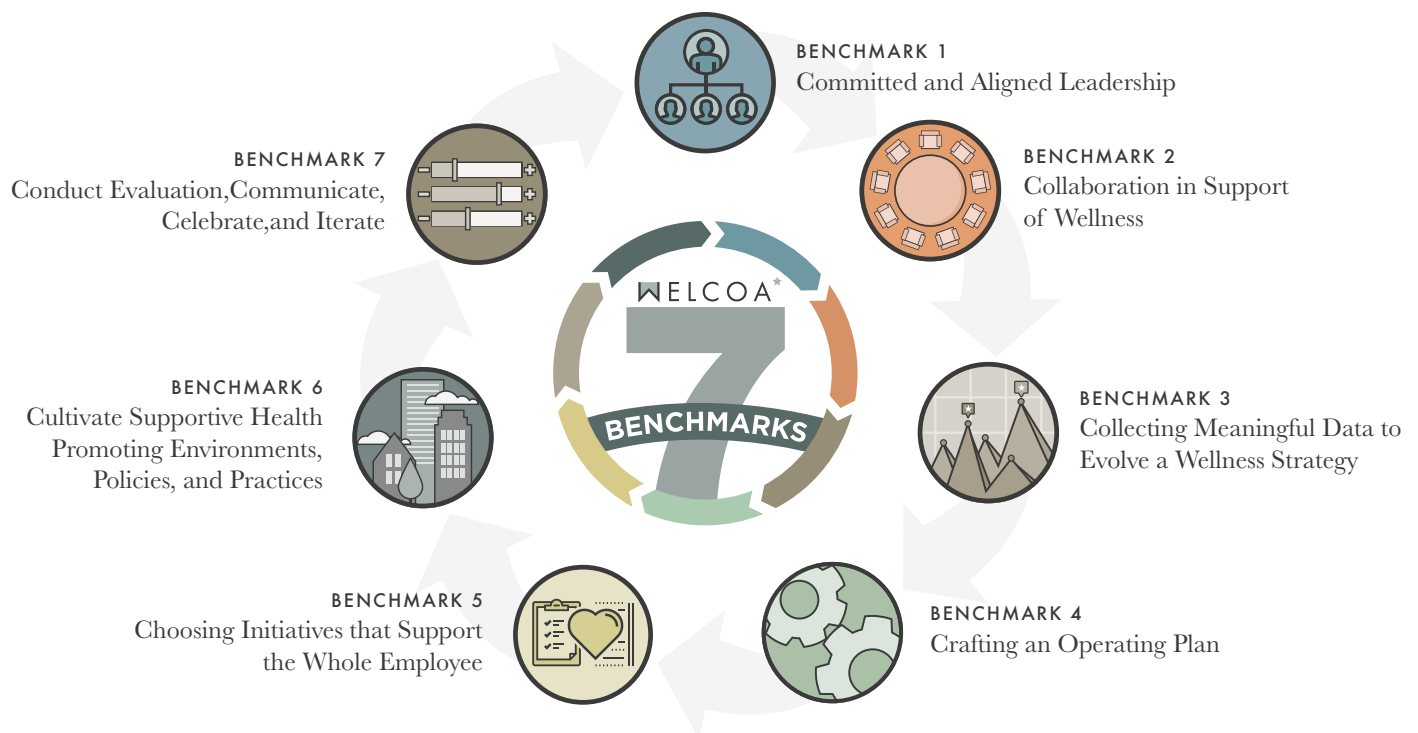


PREPARING TO TAKE THE WELL WORKPLACE CHECKLIST

## Evaluate Your Wellness Program with WELCOA's 7 Benchmarks

### Why the Seven Benchmarks Approach?

WELCOA's Seven Benchmarks approach is a logic model comprised of seven iterative steps, that when completed in an aligned way, will ensure that you have a successful wellness initiative that matches your organization's values, mission, vision and goals for employee wellness.



## Here's how you can use the Seven Benchmarks to create aligned, meaningful wellness initiatives.

### BENCHMARK 1

Ensure leadership understands the value of wellness to the organization.

### BENCHMARK 2

Protect your program from silos

### BENCHMARK 3

Understand the needs of your population and how you are currently doing at achieving organization's goals.

### BENCHMARK 4

Create a strategic plan that will ensure success.

### BENCHMARK 5

Choose initiatives that will address both organizational and programmatic goals for wellness.

### BENCHMARK 6

Understand the ways in which culture and the environment are working against you and remove those barriers.

### BENCHMARK 7

Know whether you were successful and be able to communicate that success to leadership and other stakeholders.

## How will Checklist use my data?

Even if it is your first time taking the Checklist, it is very important that you are prepared to provide accurate information about the current state of your wellness initiative. The Checklist report will help you measure year over year program improvements by providing trend analysis. Answering thoughtfully and honestly each time you take the Checklist will ensure that you will reap the full benefit of new Checklist reporting features. In addition, WELCOA uses your Checklist data to customize your experience and provide meaningful recommendations and resources.

## What kinds of questions does the Checklist ask?

Before taking the Checklist, take a moment to prepare by reviewing the kinds of questions you will be asked.

### **Benchmark 1: Committed and Aligned Leadership**

- Are your organization's vision and values aligned with employee wellness?
- Do you have a wellness vision statement that is separate from your organization-level vision and values?
- Is that wellness vision statement communicated to employees by leadership?
- Is your organization's wellness strategy positioned as a way to achieve the larger vision of the organization?
- In what ways is wellness built into standardized "non-wellness" management or leadership training?

**Benchmark 2: Collaboration in Support of Wellness**

- Does your organization have an informal or formal structure for supporting employee wellness (formal wellness committee/team OR otherwise built into how you operate as an organization)?
- What are the different job types in your organization and how are they included in your wellness strategy?
- What business units are involved in your wellness strategy?
- What voices (voice of employee, voice of internal & external stakeholders, etc.) are represented in your strategy?
- Is leadership involved with accountable collaborators (wellness team)?
- In what ways do your employees experience work and culture differently?

**Benchmark 3: Collecting Meaningful Data to Evolve a Wellness Strategy**

- What kind of data do you collect to assess achievement of the organization's strategic goals?
- What kinds of data you collect to address the following areas of employees' wellness in the current state?
  - Physical health
  - Emotional health
  - Mental health
  - Sense of meaning/purpose/  
personal values
  - Financial wellness
  - Perceived safety (physical and psychological)
  - Perceived ability to grow professionally within  
the organization

**Benchmark 4: Crafting an Operating Plan**

- Do you have a wellness initiative vision statement?
- Do you have SMART goals for one year of planning to take steps toward achieving your vision?
- Have you planned out specific initiatives to implement that will help you achieve your goals?
- Do you have a formal operating plan in place for your wellness strategy including roles/responsibilities, timelines, budgets, and evaluation metrics?

**Benchmark 5: Choosing Initiatives that Support the Whole Employee**

- What programmatic approaches are you using to achieve your goals?
- Are the programs you roll out aligned with what your vision for wellness?
  - Physical health
  - Emotional health
  - Mental health
  - Sense of meaning/purpose/  
personal values
  - Financial wellness
  - Perceived safety (physical and psychological)
  - Perceived ability to grow professionally within  
the organization
- Do your programs support the whole employee across all aspects of wellness?

## **Benchmark 6: Cultivate Supportive Health Promoting Environments, Policies, and Practices**

- How supportive are the organization's environment, policies & practices including:
  - The built environment?
  - Worksite and workstation conditions are designed to support more physical activity?
  - Access to healthy food?
  - Access to private spaces?
- How supportive are your organization's employee benefits in fostering and promoting wellness?
- What of the following wellness touchpoints are present in your organizational culture?
  - Communication systems that promote wellness
  - Traditions & symbols
  - Training that integrates health and wellness
  - Recognition programs and models for pro-wellness behaviors (vs. overwork, etc.)
- What kinds of social atmosphere/opportunities for connectivity are present in your organization?
- How does your organization incorporate sustainable and socially responsible business practices?

## **Benchmark 7: Conduct Evaluation, Communicate, Celebrate, and Iterate**

- How do you measure the impact of your efforts to support wellness?
- What kinds of data are you collecting to evaluate achievement of your program's goals?
- In what ways do you communicate findings from your evaluation efforts?
- How do your evaluation findings inform continuous improvement efforts in your organization?

**TAKE THE CHECKLIST:** [checklist.welcoa.org](https://checklist.welcoa.org)

**MORE ABOUT 7 BENCHMARKS:** [welcoa.org/seven-benchmarks](https://welcoa.org/seven-benchmarks)

**WATCH VIDEO ABOUT THE CHECKLIST:** [welcoa.org/checklist](https://welcoa.org/checklist)