WELCOA★
WELL WORKPLACE CHECKLIST

Checklist Questions

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Checklist Questions

BENCHMARK 1: Committed and Aligned Leadership

1. For this Benchmark, we will be asking about leadership support at all levels of your organization. Please tell us which of the following levels of leadership currently exist in your organization: (CHECK ALL THAT APPLY)

   CEO or most senior leader   VPs and Directors

   Other C-suite   Managers

Organizational Commitment

The following questions are about the vision and values of your organization as a whole (either written or unwritten).

2. Our organization's vision and values reflect the importance of employee wellness.

   Yes   No

3. Our organization's vision and values reflect input from employees at all levels.

   Yes   No   Don't Know

4. Our leaders communicate a purpose for our organization that's about more than profit. This could include serving the needs of employees and other groups (for example, customers, students, patients, community citizens), or improving the environment.

   Yes   No

5. In addition to our overall vision, we have a formally stated wellness vision.

   Yes   No

Strategic Planning

6. Creating a supportive environment and culture for employee wellness is a strategic priority for the organization. Examples of environment could include the physical workspace, formal policies, benefits, and practices that support employee wellness. Examples of culture could include the norms, rituals, traditions or other informal practices that support employee wellness.

   Yes   No   Don't Know

7. Employee wellness is included in our strategic business planning.

   Yes   No   Don't Know

8. Our wellness strategy is positioned to help us achieve the larger vision of the organization.

   Yes   No

9. What does your organization want to achieve overall with its approach to wellness? **Please note:** We will ask about more specific wellness goals in Benchmark 2 and 4. (SELECT AT LEAST 2 AND STAR YOUR TOP 2 PRIORITIES.)

Support employee health and wellness

Foster a healthy organizational culture

Ensure we have a healthy workplace environment

Attract and retain the best talent

Improve employee productivity

Improve brand identity (e.g., your organization's reputation)

Enhance innovation

Improve quality of service

Improve quality of products

Improve profitability of the organization

Build customer loyalty

Increase market share

Contribute to the greater good as part of socially responsible business practices.

10. Leaders at the following levels contribute to strategic planning for wellness. *(Only answer the following based on your response to question 1)*

CEO or most senior leader

Very much   Somewhat true

Mostly true   Not at all

Other c-suite

Very much   Somewhat true

Mostly true   Not at all

VPs, Directors

Very much   Somewhat true

Mostly true   Not at all

Managers and Supervisors

Very much   Somewhat true

Mostly true   Not at all

11. For our strategic wellness planning, we seek and incorporate input from our employees.

Very much   Somewhat true

Mostly true   Not at all

Which of the following is considered when developing your wellness strategy?

12. The wellness of our own employees.

   Yes   No

13. The wellness of spouses & dependents.

   Yes   No

14. The wellness of employees in groups that we do business or interact with. *(This could include suppliers of materials, manufacturing and distribution partners, other service and support partners, communities, etc.)*

   Yes   No   Not applicable

15. The wellness of our customers. *(This could include patients, students, or other stakeholder groups for some non-profit or public sector organizations.)*

   Yes   No

16. The wellness of our local community.

   Yes   No

17. The wellness of society as a whole *(This could include the wellness of people at the national or global level.)*

   Yes   No   Not applicable

Leader Alignment

18. These questions assess the ways in which leaders act as strong champions for wellness.

   a. Our leaders are authentic, open, and supportive.

   Very much   Somewhat

   Mostly   Not at all

   b. Our leaders often talk about the organization's vision for wellness.

   Very much   Somewhat

   Mostly   Not at all

   c. Our leaders create and/or follow policies that promote wellness and work/life balance.

   Very much   Somewhat

   Mostly   Not at all

   d. Our leaders often communicate why wellness is important to the organization.

   Very much   Somewhat

   Mostly   Not at all

   e. Our leaders often talk about how employees can use the organizations' wellness resources.

   Very much   Somewhat

   Mostly   Not at all

f.   Our leaders track and celebrate what we do to support wellness.

    Very much   Somewhat

    Mostly   Not at all

Leader Role Modeling

19. These questions assess the ways in which leaders act as strong role models for wellness.

   a.   Leaders visibly engage in the organization's wellness initiatives.

       Very much   Somewhat   Not applicable

       Mostly   Not at all

   b.   Leaders visibly engage in personal practices that support their wellness.

       Very much   Somewhat   Not applicable

       Mostly   Not at all

   c.   They demonstrate caring and compassion for employees.

       Very much   Somewhat   Not applicable

       Mostly   Not at all

Leader Accountability

20. Leaders make sure we have resources we need to effectively support employee wellness.

    Yes   No

21. At least one senior leader has direct responsibility for the wellness of employees. In other words, it's part of his or her job.

    Yes   No

22. Support for employee wellness is factored into the performance goals of leaders and managers. *(Performance measures might include information about perceived leader and manager support collected from direct reports. It might also include information about the wellness of employees, and/or the success of wellness initiatives in that leader's area of the company.)*

    Yes   No

Leader Support

23. We consider the ability to support employee wellness when we hire and promote managers and leaders.

    Very true   Somewhat true

    Mostly true   Not at all true

24. Everyone in the organization who leads or manages people is provided with formal resources and/or training to support employee wellness.

    Very true   Somewhat true

    Mostly true   Not at all true

25. Our leaders and managers are trained on the basic principles of human motivation. This includes:

    a. Supporting autonomy. *(This could involve allowing people to have some control over how their work is done, and helping them work in ways that they find meaningful and aligns with their personal values.)*

        Yes   No   Don't know

    a. Fostering social connections. *(This could include resources and/or training that help managers and leaders create a sense of caring and belonging among employees.)*

        Yes   No   Don't know

    a. Fostering competence. (*This could include helping people feel capable and effective in their work, and help them use their strengths and express their capacities.)*

        Yes   No   Don't know

Communication & Celebration

26. Leaders regularly highlight and celebrate positive examples of wellness in the organization.

    Yes   No

Continuous Improvement

27. Leaders use evaluation findings (e.g., findings from measures of employee engagement, satisfaction, perceptions of culture, health outcomes, etc.) to improve the organization's strategy for wellness.

    Yes   No

28. Leaders provide ideas for improving employee wellness to the person or group responsible for managing the organization's wellness approach.

    Yes   No

BENCHMARK 2: Collaboration in Support of Wellness

29. Which of the following best describes how your organization supports employee wellness?

    We have a formal wellness committee or team responsible for planning and promoting employee wellness efforts. *(If yes, skip to question 30)*

        Yes   No   Don't know

    We do not have a formal wellness committee or team, but supporting employee wellness is built into how we operate as an organization (e.g., people from multiple departments strategically collaborate to improve employee wellness).

        Yes   No   Don't know

    We currently do not have any process in place to support wellness.

        Yes   No   Don't know

30. The leader of the wellness committee or team has direct responsibility for employee wellness (e.g. it is in his/her job description or annual performance goals).

        Yes, Full-Time   Yes, Part-Time   No

31. How much training in employee wellness methods has the leader of the wellness team or committee had?
    (CHECK THE BOX THAT APPLIES BEST)

    They have not been trained in employee wellness methods and do not plan to train.

    They have not been trained in employee wellness methods but plan to receive training.

    They have received some training in employee wellness methods (This would include past vocational training and/or a college degree in a wellness-related discipline.

    They have received training in employee wellness methods in the past, and continue to pursue annual training opportunities to keep up to date with wellness best practices.

32. The group meets regularly.
    Yes   No

33. The group meetings have formal agenda.
    Yes   No

34. The wellness team/committee has direct access to a senior-level champion for wellness who ensures they have what they need to be successful.
    Yes   No

35. Members of the wellness committee or team are highlighted or rewarded (either formally or informally) for their contributions to employee wellness.
    Yes   No

Collaborative Planning

36. Which of the following departments are engaged in strategic planning for the organization's overall wellness approach? Please check "Not Applicable" for any departments that are not part of your organization.

Potential Internal Collaboration Partners	Involved	Not Involved	Not Applicable
Sales or business development (e.g., someone in a true sales role or who pursues new strategic opportunities and partnerships)			
Wellness coordinator			
Unions			
Human resources			
Communications			
Organizational development (e.g., someone who helps organizations improve policies, practices, leadership, job design, etc.)			
Training and development			
Strategy (e.g., an individual whose role is to help the organization with strategies or over-all plans to help meet corporate goals)			
Quality			
Safety			
Marketing			
Sustainability (e.g., a person who is responsible for finding innovative and economical ways to reduce the impact of the organization's practices on the environment)			
Other			

37. We include relevant external stakeholders (e.g., vendors, health plans, communities, consultants) in the wellness initiative planning process.

    Very true   Somewhat true

    Mostly true   Not at all true

Inclusivity

38. Which of the following types of employees are engaged in strategic planning for the organization's overall wellness approach? Please check "Not Applicable" for any types of employees that are not part of your organization.

	Involved	Not Involved	Not Applicable
Employees who work primarily in the field			
Employees who work from home or telecommuters			
Workers at regional offices or satellite facilities			
Workers in corporate headquarters or main offices			
Workers who don't have daily access to computers			

Grassroots Efforts

39. We encourage and empower employees from different areas and departments in the organization to create their own unique wellness approaches.

    Yes   No

40. Individuals from the broader community are engaged/considered when designing approaches and initiatives.

    Yes   No

Use of Technology

41. What types of technology does the organization use to ensure effective communication and collaboration across departments and work areas?

    a. Document sharing apps (for example Google Docs, Microsoft Office Online, SharePoint, Zoho Docs)

        Yes   No

    b. Collaboration apps (for example brainstorming, brain writing, Candor, Canvas)

        Yes   No

    c. Messaging apps (for example Skype, Twitter, Slack, Yammer, Chatter)

        Yes   No

    d. Other type of technology

        Yes   No

BENCHMARK 3: Collecting Meaningful Data to Evolve a Wellness Strategy

Data Privacy

42. Our organization has a relentless focus on safeguarding the privacy and confidentiality of personal health information.

Very true　　　　　　　　　　　　Somewhat true

Mostly true　　　　　　　　　　　　Not at all true

43. All major employee groups are involved and/or considered when planning the evaluation for our wellness approach.

Yes　　　　　　　　　　　　No　　　　　　　　　　　　I don't know

44. We ask all employee groups about the types of support for wellness that would be most helpful to them.

Yes　　　　　　　　　　　　No　　　　　　　　　　　　I don't know

45. We ask all employee groups about which wellness goals or outcomes matter most to them.

Yes　　　　　　　　　　　　No　　　　　　　　　　　　I don't know

46. We work to find and highlight "bright spots," or examples of what is working well in the organization.

Yes　　　　　　　　　　　　No　　　　　　　　　　　　I don't know

47. We collect data about whether employees believe they are able to "live" the organization's values.

Yes　　　　　　　　　　　　No　　　　　　　　　　　　I don't know

48. We track information about whether we are achieving the organization's overall vision and values.

Yes　　　　　　　　　　　　No　　　　　　　　　　　　I don't know

49. We collect data about whether we are achieving the goals of our wellness initiatives.

Yes　　　　　　　　　　　　No　　　　　　　　　　　　I don't know

50. We use the data we collect to shape/refine the vision and mission of our wellness initiatives.

Yes　　　　　　　　　　　　No　　　　　　　　　　　　I don't know

Meaningful Workforce Data

51. We collect meaningful information about employee's physical health to inform our wellness efforts.
(This could include information from a health risk assessment or other measures of self-reported strength, energy, vitality, health status, as well as biometric values, diagnosed health conditions, etc.)

Yes, we currently collect this information.

No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months.

No, we do not currently collect this information, and have no plans to collect it in the near future.

52. We collect meaningful information about employee's mental health to inform our wellness efforts.
(This could include indicators of excessive stress, anxiety, depression, diagnosed mental health condition(s), etc.)

Yes, we currently collect this information.

No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months.

No, we do not currently collect this information, and have no plans to collect it in the near future.

53. We collect meaningful information about employee's emotional health to inform our wellness initiatives.
(This could include positive feelings like happiness, confidence, resilience, optimism, gratefulness, mindfulness, feeling validated and encouraged.)

    Yes, we currently collect this information.

    No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months.

    No, we do not currently collect this information, and have no plans to collect it in the near future.

54. We collect meaningful information about employee's perceived safety to inform our wellness initiatives.
(This could include assessing whether employees feel safe from physical and psychological harm at work, feel secure enough to take calculated risks and show vulnerability, and are free of concern about meeting basic survival needs.)

    Yes, we currently collect this information.

    No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

    No, we do not currently collect this information, and have no plans to collect it in the near future.

55. We collect meaningful information about employees' meaning and/or purpose to inform our wellness initiatives.
(This could include life satisfaction, purpose in life, feeling part of something bigger than one's self, knowing that your work matters.)

    Yes, we currently collect this information.

    No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

    No, we do not currently collect this information, and have no plans to collect it in the near future.

56. We collect meaningful information about employee's financial wellness to inform our wellness initiatives.
(This could include security, safety, able to live comfortably, able to save for retirement, etc.)

    Yes, we currently collect this information.

    No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

    No, we do not currently collect this information, and have no plans to collect it in the near future.

57. We collect meaningful information about employee's career/achievement to inform our wellness initiatives.
(This could include work passion, engagement, meaningful work, worker satisfaction, feeling supported, having the resources and autonomy to achieve goals, succeeding at meeting individual goals and work aspirations, etc.)

    Yes, we currently collect this information.

    No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

    No, we do not currently collect this information, and have no plans to collect it in the near future.

58. We collect meaningful information about employees' perceived growth to inform our wellness initiatives.
(This could include feeling able to progress in career, learning and being challenged to use and expand on strengths, etc.)

    Yes, we currently collect this information.

    No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

    No, we do not currently collect this information, and have no plans to collect it in the near future.

59. a. We collect meaningful information about whether employees feel socially connected at work. *(This could include positive, trusting relationships with others. A sense of belonging, acceptance and support. Positive connection with managers and leaders. Feeling a sense of connection with colleagues, etc.)*

   Yes, we currently collect this information.

   No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

   No, we do not currently collect this information, and have no plans to collect it in the near future.

   b. We collect meaningful information about whether employees feel socially connected at home. *(This could include perceived support from and relationships with family members.)*

   Yes, we currently collect this information.

   No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

   No, we do not currently collect this information, and have no plans to collect it in the near future.

   c. We collect meaningful information about whether employees feel socially connected with friends and community. *(This could include supportive friends, ties to the neighborhood and community.)*

   Yes, we currently collect this information.

   No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

   No, we do not currently collect this information, and have no plans to collect it in the near future.

60. We measure whether employees feel their work aligns with their own personal values.

   Yes, we currently collect this information.

   No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

   No, we do not currently collect this information, and have no plans to collect it in the near future.

61. a. We measure indicators of performance and/or innovation. *(This could include quality of service, creativity, quality of products, etc.)*

   Yes, we currently collect this information.

   No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

   No, we do not currently collect this information, and have no plans to collect it in the near future.

   b. We measure indicators of productivity. *(This could include absenteeism, presenteeism, employee turnover, etc.)*

   Yes, we currently collect this information.

   No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

   No, we do not currently collect this information, and have no plans to collect it in the near future.

62. We collect information on health-related expenditures. *(This could include things like disability claims, workers' compensation claims, injury/accident records, and medical claims, etc.)*

   Yes, we currently collect this information.

   No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

   No, we do not currently collect this information, and have no plans to collect it in the near future.

63. We collect information on health behaviors. *(This could include nutrition, physical activity, smoking cessation, responsible alcohol use, stress management, etc.)*

> Yes, we currently collect this information.
>
> No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months
>
> No, we do not currently collect this information, and have no plans to collect it in the near future.

64. We track use of preventive screenings as recommended by current relevant guidelines.

> Yes, we currently collect this information.
>
> No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months
>
> No, we do not currently collect this information, and have no plans to collect it in the near future.

65. Which of the following methods do you use to collect information about your worksite and workstation conditions? *(This could include things like ergonomics, conditions that encourage productivity (places for quiet concentration, places to convene and brainstorm), maximizing natural light, encouraging movement, heating, ventilation, availability of healthy food, workplace design that promotes connections and social interaction.)*

a. Survey of employee perceptions about worksite and workstation conditions.

> Yes, we currently collect this information.
>
> No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months
>
> No, we do not currently collect this information, and have no plans to collect it in the near future.

b. Audit of physical worksite and workstation conditions.

> Yes, we currently collect this information.
>
> No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months
>
> No, we do not currently collect this information, and have no plans to collect it in the near future.

c. Interviews and/or focus groups.

> Yes, we currently collect this information.
>
> No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months
>
> No, we do not currently collect this information, and have no plans to collect it in the near future.

d. Observational methods. *(Examples could include formal or informal efforts to observe and learn from the feedback and/or natural behavior of employees in their workstations and your worksite.)*

> Yes, we currently collect this information.
>
> No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months
>
> No, we do not currently collect this information, and have no plans to collect it in the near future.

66. Which of the following methods do you use to collect information about your worksite and workstation conditions? *(This could include things like ergonomics, conditions that encourage productivity (places for quiet concentration, places to convene and brainstorm), maximizing natural light, encouraging movement, heating, ventilation, availability of healthy food, workplace design that promotes connections and social interaction.)*

    a. Survey of employee perceptions about our benefits, policies, and practices.

        Yes, we currently collect this information.

        No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

        No, we do not currently collect this information, and have no plans to collect it in the near future.

    b. Audit of our current benefits, policies, and practices. *(Example audits could include this WELCOA's Well Workplace™ Checklist, the CDC Worksite Health ScoreCard, HERO Scorecard, Healthlead, WiScore,® HECheck, etc.)*

        Yes, we currently collect this information.

        No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

        No, we do not currently collect this information, and have no plans to collect it in the near future.

    c. Interviews and/or focus groups.

        Yes, we currently collect this information.

        No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

        No, we do not currently collect this information, and have no plans to collect it in the near future.

    d. Observational methods. *(Examples could include formal or informal efforts to carefully observe and track the use of benefits, policies, and practices)*

        Yes, we currently collect this information.

        No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

        No, we do not currently collect this information, and have no plans to collect it in the near future.

67. Which of the following methods do you use to collect information about your organizational culture and/or climate? *(This could include the key patterns of beliefs, values, assumptions, and behavioral norms in the organization (culture), and/or assessing the shared perceptions and attitudes about the organization (climate))*

    a. Survey of employee perceptions about our culture and/or climate.

        Yes, we currently collect this information.

        No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

        No, we do not currently collect this information, and have no plans to collect it in the near future.

    b. Audit or formal review of wellness culture indicators. *(This could include organizational values, norms, goals, rituals, assumptions, etc.)*

        Yes, we currently collect this information.

        No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

        No, we do not currently collect this information, and have no plans to collect it in the near future.

c. Interviews and/or focus groups.

Yes, we currently collect this information.

No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

No, we do not currently collect this information, and have no plans to collect it in the near future.

d. Observational methods. *(Examples could include formal or informal efforts to carefully observe and track the natural behavior of employees)*

Yes, we currently collect this information.

No, we do not currently collect this information, but plan to collect it in the next 6 to 12 months

No, we do not currently collect this information, and have no plans to collect it in the near future.

BENCHMARK 4: Crafting an Operating Plan

Strategic Program Planning

68. Executive leaders are actively engaged in the planning process.

Very true   Somewhat true

Mostly true   Not at all true

69. Our plan for resources, programs and initiatives includes:

a. Specific goals and measurable objectives (linked to the company's strategic priorities)

Yes   No

b. Timelines for implementation

Yes   No

c. Roles and responsibilities for completion of objectives

Yes   No

d. Itemized budget sufficient to support all initiatives

Yes   No

e. Appropriate marketing strategies to effectively promote our wellness philosophy and initiatives

Yes   No

f. Clear communications about how and why people can get involved

Yes   No

g. Evaluation planning to measure the stated goals and objectives

Yes   No

h. Launch or kick-off celebration to announce our programs and initiatives

Yes   No

70. Choose your top five wellness program goals and star your first and second priority. In Benchmark 1, we asked about what your organization wanted to achieve with its approach to wellness. Here we are asking about the specific program-related goals of your wellness approach.

	Yes	No
Manage costs (e.g., costs of health care coverage, workers comp, disability, etc.		
Improve physical health of employees		
Improve mental health of employees		
Support emotional health		
Employees have a sense of psychological safety		
Help employees find meaning and purpose in their work and lives		
Improve employee morale, satisfaction, engagement, and/or work passion		
Support financial wellness		
Help create trust and connection in relationships between employees, managers, and leaders		
Help employees feel they have the support, resources, and autonomy to achieve their career and achievement goals		
Support employee's ability to build on their strengths—to learn and grow in their work and lives Help employees have a sense of positivity, optimism, gratefulness		
Create heathy worksite and work station conditions		
Ensure benefits, policies, and practices support employee wellness		
Reduce absenteeism/presenteeism		
Positively impact the health of employees' families		
Recruit the best talent		
Retain employees		
Link employees to community resources		
Improve conditions for health in communities		

Other:

Strategic Planning for Environment, Programs, and Policies

71. We seek to align the following with our wellness strategy:

   a. Policies and procedures

       Yes   No

   b. Hiring and promotion practices

       Yes   No

   c. Manager and leadership training and development

       Yes   No

   d. Career development opportunities for all employees

       Yes   No

e. Benefits and compensation
    Yes   No

f. Fair and ethical organizational governance
    Yes   No

g. The physical workplace environment
    Yes   No

h. Chronic care management services
    Yes   No

i. Other:

BENCHMARK 5: Choosing Initiatives That Support the Whole Employee

Caring Approach

72. Our initiatives are designed to help employees achieve their own personal wellness goals.

    Very much   Somewhat

    Mostly   Not at all

73. Our wellness initiatives are designed to help employees find purpose and meaning in their work and lives.

    Very much   Somewhat

    Mostly   Not at all

74. We help employees understand the relationship between living a healthy lifestyle and their ability to fulfill their passion and purpose.

    Very much   Somewhat

    Mostly   Not at all

75. Both employees and the organization understand that taking good care of our employees is good for employees and good for business.

    Very much   Somewhat

    Mostly   Not at all

76. Our wellness approach is based on genuine caring for our employees and their families.

    Very much   Somewhat

    Mostly   Not at all

Autonomous Approach

77. How many of your wellness programs, resources, and initiatives are available to:

Salaried employees
| All | Some | Not applicable |
| Most | None | |

Hourly employees
| All | Some | Not applicable |
| Most | None | |

78. How many of your wellness programs, resources, and initiatives are available to:

Spouses
| All | Some | Not applicable |
| Most | None | |

Dependents
| All | Some | Not applicable |
| Most | None | |

Retirees
| All | Some | Not applicable |
| Most | None | |

79. We have a formal or informal policy allowing participation in wellness programs and initiatives during work time.
Yes   No

80. Participation in wellness programs and initiatives during work time is actively encouraged.
| Very True | Somewhat True |
| Mostly True | Not At All True |

81. Our initiatives provide choice over whether and how to engage.
| Very True | Somewhat True |
| Mostly True | Not At All True |

82. We provide technological tools to help employees connect and take action together.
(e.g., challenge platforms, social media, etc.)
Yes   No

Comprehensive Approach

83. Our approaches support the physical health needs of our employees.
| Very Much | Somewhat |
| Mostly | Not At All |

What areas of support do your wellness initiatives address?

84. Physical activity

Yes, we currently do this

No, but we have plans to do this in the near future

No, and we have no plans to do this in the foreseeable future

85. Nutrition/weight management

Yes, we currently do this

No, but we have plans to do this in the near future

No, and we have no plans to do this in the foreseeable future

86. Smoking cessation

Yes, we currently do this

No, but we have plans to do this in the near future

No, and we have no plans to do this in the foreseeable future

87. Responsible alcohol use

Yes, we currently do this

No, but we have plans to do this in the near future

No, and we have no plans to do this in the foreseeable future

88. Disease management

Yes, we currently do this

No, but we have plans to do this in the near future

No, and we have no plans to do this in the foreseeable future

89. Medical self-care

Yes, we currently do this

No, but we have plans to do this in the near future

No, and we have no plans to do this in the foreseeable future

90. Preventive screenings

Yes, we currently do this

No, but we have plans to do this in the near future

No, and we have no plans to do this in the foreseeable future

91. We provide stress management programs to support mental health.

> Yes, we currently do this

> No, but we have plans to do this in the near future

> No, and we have no plans to do this in the foreseeable future

> N/A

92. We provide an Employee Assistance Program (EAP) that refers to qualified professionals for short or long-term treatment for depression, anxiety, substance use, addiction and other mental health issues.

> Yes, we currently do this

> No, but we have plans to do this in the near future

> No, and we have no plans to do this in the foreseeable future

> N/A

93. We support the emotional health of our employees. *(Examples might include helping employees develop brain health, mindfulness, gratitude practices, optimism, resilience, etc.)*

> Yes, we currently do this

> No, but we have plans to do this in the near future

> No, and we have no plans to do this in the foreseeable future

> N/A

94. We work to promote a sense of psychological safety. *(This could include training and resources designed to promote trust and help employees, managers, and leaders feel secure enough to take calculated risks and show vulnerability.)*

> Yes, we currently do this

> No, but we have plans to do this in the near future

> No, and we have no plans to do this in the foreseeable future

> N/A

95. We help employees with develop a sense of meaning and purpose. *(This could include life satisfaction, purpose in life, feeling part of something bigger than one's self, knowing that your work matters.)*

> Yes, we currently do this

> No, but we have plans to do this in the near future

> No, and we have no plans to do this in the foreseeable future

> N/A

96. We help employees with their financial wellness. *(Examples could include resources and policies that promote development of financial security and freedom of choice, in the present and in the future.)*

> Yes, we currently do this

> No, but we have plans to do this in the near future

> No, and we have no plans to do this in the foreseeable future

> N/A

97. We provide opportunities to develop work/career/achievement. *(Examples might include career planning, opportunities for personal growth and professional development, etc.)*

 Yes, we currently do this

 No, but we have plans to do this in the near future

 No, and we have no plans to do this in the foreseeable future

 N/A

98. We help employees create deeper connections to their communities. *(Examples could include promoting access to healthy food in the community, initiatives designed to support health at the family and community level.)*

 Yes, we currently do this

 No, but we have plans to do this in the near future

 No, and we have no plans to do this in the foreseeable future

 N/A

99. We work to create positive social connections with:

 a. Employees and their supervisors

 Yes, we currently do this

 No, but we have plans to do this in the near future

 No, and we have no plans to do this in the foreseeable future

 N/A

 b. Employees and their collegues

 Yes, we currently do this

 No, but we have plans to do this in the near future

 No, and we have no plans to do this in the foreseeable future

 N/A

 c. Employees and their family/friends

 Yes, we currently do this

 No, but we have plans to do this in the near future

 No, and we have no plans to do this in the foreseeable future

 N/A

 d. Employees and their community

 Yes, we currently do this

 No, but we have plans to do this in the near future

 No, and we have no plans to do this in the foreseeable future

 N/A

100. How much does your organization own and manage your wellness efforts (versus how much is managed by a vendor)? *(Examples could include development opportunities for employees, especially managers, to help build competence, foster positive social connections, support employee autonomy, and align work roles with individual values and capabilities.)*

    Yes, we currently do this

    No, but we have plans to do this in the near future

    No, and we have no plans to do this in the foreseeable future

    N/A

101. We work to support and foster intrinsic motivation in our employees. *(Examples could include development opportunities for employees, especially managers, to help build competence, foster positive social connections, support employee autonomy, and align work roles with individual values and capabilities.)*

    Yes, we currently do this

    No, but we have plans to do this in the near future

    No, and we have no plans to do this in the foreseeable future

    N/A

102. How much does your organization own and manage your wellness efforts (home-grown) versus how much is managed by a vendor (vendor-managed)?

    _____   _____   _____   _____

    Home-Grown   Vendor-Managed
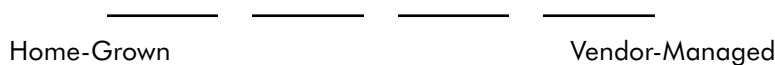
BENCHMARK 6: Cultivate Supportive Health Promoting Environments, Policies, and Practices

Work Environment

103. Please indicate whether your organization has achieved any of the following recognitions for healthy worksite conditions.

    a. Leadership in Energy and Environmental Design (LEED)

    Yes   No   Don't know

    b. Fitwel Certification

    Yes   No   Don't know

    c. WELL Building Standard

    Yes   No   Don't know

104. Our worksite provides online access to private space.

    a. Our worksite has healthy, enjoyable, and safe outdoor spaces.

    Very True   Somewhat True

    Mostly True   Not At All True

    b. Our worksite has a healthy indoor physical environment.

    Very True   Somewhat True

    Mostly True   Not At All True

c.   Our worksite has a healthy indoor physical environment.

    Very True   Somewhat True

    Mostly True   Not At All True

d.   Our worksite design encourages healthy eating.

    Very True   Somewhat True

    Mostly True   Not At All True

e.   Our worksite design encourages physical activity and minimizes sedentary behavior.

    Very True   Somewhat True

    Mostly True   Not At All True

f.   Our worksite has healthy workstation characteristics.

    Very True   Somewhat True

    Mostly True   Not At All True

g.   Our workplace design promotes connection, collaboration, and social interaction.

    Very True   Somewhat True

    Mostly True   Not At All True

Employee and Family Benefits

105. We provide health insurance for:

a.   Full-time workers

    Yes   No

b.   Part-time workers

    Yes   No

c.   Spouses and Dependents

    Yes   No

106. Our healthcare benefits are aligned in support of wellness. We offer subsidies to purchase individual insurance through an exchange.

    Yes   No   Not applicable

107. We offer benefit plan designed to reimburse employees for qualified medical expenses. *(Examples include health savings accounts, flexible spending accounts, etc.)*

    Yes   No

Culture Touchpoints

108. In our organization…

    a.   We have traditions that support employee health and wellness.

Strongly Agree	Neither agree nor disagree	Strongly Disagree
Agree	Disagree	

    b.   People are rewarded and recognized for efforts to live a healthy lifestyle.

Strongly Agree	Neither agree nor disagree	Strongly Disagree
Agree	Disagree	

    c.   Overworking or other unhealthy practices are not praised or rewarded.

Strongly Agree	Neither agree nor disagree	Strongly Disagree
Agree	Disagree	

    d.   Leadership and peer opposition for employees engaging in healthy behaviors at work is not tolerated. *(Example might be meditation, eating healthy, being active, etc.)*

Strongly Agree	Neither agree nor disagree	Strongly Disagree
Agree	Disagree	

Policies and Practices

109. In our organization…

    a.   We offer flexibility in work scheduling and time off.

       Yes   No

    b.   The ability to support employee wellness is considered as a factor in hiring, onboarding, and promotion.

       Yes   No

    c.   Whenever possible we allow employees some control over how they do their work.

       Yes   No

    d.   We work to help employees develop meaningful work and create alignment between their skills, values, purpose, and work or career.

       Yes   No

Supportive Atmosphere

110. We encourage and empower individuals and work teams to craft their own healthy cultures and environments.

       Yes   No

111. Our culture and environment fosters a sense of community, a shared vision, and a positive outlook.

       Yes   No

112. The people in our organization support each other's wellness.
    Yes   No

Socially Responsible Business Practices

113. a. Our organization gives employees paid time off to volunteer for a charity.
    Yes   No

    b. Our organization will match employee's charitable donations.
    Yes   No

BENCHMARK 7: Conduct Evaluation, Communicate, Celebrate, and Iterate

Evaluation Strategy

114. We have clear measures and success criteria that reflect the stated goals of our wellness initiatives.
    Yes   No

115. Our evaluation assesses outcomes that the organization's wellness approach is designed to impact.
    Yes   No

Workforce Outcomes

In Benchmark 3, we asked about the data you collect to help inform your operational planning for your wellness approach. Here we are asking about how you use data to assess the impact of your approach.

116. We regularly evaluate change over time in physical health. *(This could include self-reported information from a health risk assessment, or other measures of strength, energy, vitality, health status, as well as biometric values, diagnosed health conditions, etc.)*
    Yes   No   Not applicable

117. We regularly measure change over time in mental health. *(This could include indicators of excessive stress, anxiety, depression, diagnosed mental health condition(s), etc.)*
    Yes   No   Not applicable

118. We regularly measure change over time in emotional health. (*This could include positive feelings like happiness, confidence, resilience, optimism, gratefulness, mindfulness, feeling validated and encouraged.)*
    Yes   No   Not applicable

119. We regularly evaluate change over time in perceived safety. (*This could include assessing whether employees feel safe from physical and psychological harm at work, feel secure enough to take calculated risks and show vulnerability, and are free of concern about meeting basic survival needs.)*
    Yes   No   Not applicable

120. We regularly evaluate change over time in perceptions of meaning/purpose. (*This could include life satisfaction, purpose in life, feeling part of something bigger than one's self, knowing that one's work matters.)*
    Yes   No   Not applicable

121. We regularly evaluate change over time in financial wellness. *(This could include security, safety, able to live comfortably, able to save for retirement, etc.)*

    Yes   No   Not applicable

122. We regularly evaluate change over time in perceptions of career/achievement. *(This could include work passion and/or engagement, meaningful work, worker satisfaction, feeling supported, having the resources and autonomy to achieve goals, and succeeding at meeting individual goals and work aspirations.)*

    Yes   No   Not applicable

123. We regularly evaluate change over time in perceptions of growth. *(This could include feeling able to progress in your career, learning and being challenged to use and expand on strengths.)*

    Yes   No   Not applicable

124. We regularly evaluate change over time in social connectedness.

    a. At work… *(This could include positive, trusting relationships with others, a sense of belonging, acceptance and support, manager and leader support for wellness, feeling a sense of connection with colleagues.)*

        Yes   No   Not applicable

    b. At home… *(This could include perceived support from and relationships with family members.)*

        Yes   No   Not applicable

    c. With friends and community… *(This could include supportive friends, ties to the neighborhood and community.)*

        Yes   No   Not applicable

125. We regularly evaluate change over time in how well employees are able to live and work according to their own personal values.

    Yes   No   Not applicable

126. a. We regularly evaluate change over time in indicators of performance innovation. *(This could include absenteeism, presenteeism, turnover, etc.)*

        Yes   No   Not applicable

    b. We regularly evaluate change over time in appropriate health-related expenditures. *(This could include things like disability claims, workers' compensation claims, injury/accident records, and medical and pharmacy claims.)*

        Yes   No   Not applicable

127. We regularly evaluate change over time in health behaviors. *(This could include nutrition/weight management, physical activity, tobacco cessation, responsible alcohol use, stress management, etc.)*

    Yes   No   Not applicable

Workplace Outcomes

128. We regularly evaluate change over time in our worksite and work station conditions.

    Yes   No   Don't know

129. We regularly evaluate change over time in our policies and practices.

    Yes   No   Don't know

130. We regularly evaluate change over time in our organizational culture and/or climate.
    Yes   No   Don't know

Quality of Wellness Resources and Programs

131. Which of the following methods do you use to collect data to evaluate your wellness resources and programs?

  a. Survey of employee perceptions about wellness resources and programs.
      Yes   No   Don't know

  b. Audit of your organization's available wellness resources and programs.
      Yes   No   Don't know

  c. Interviews and/or focus groups.
      Yes   No   Don't know

  d. Observational methods (examples could include formal or informal efforts to collect feedback about wellness resources and programs).
      Yes   No   Don't know

132. We regularly track participation in health initiatives and use of supportive services.
    Yes   No   Don't know

133. We assess whether our initiatives are being delivered in effective/efficient way.
    Yes   No   Don't know

134. We assess whether our wellness initiatives are reaching the intended audiences.
    Yes   No

135. We ask our employees for their perspectives to help us understand our evaluation findings.
    Yes   No

Progress Toward Vision

136. Our evaluation findings show that our approaches are making a positive difference…

  a. …in the environment and culture of our organization
      Yes   No   Not applicable

  b. …in workforce outcomes
      Yes   No   Not applicable

  c. …for communities
      Yes   No   Not applicable

  d. …for the core business
      Yes   No   Not applicable

Communication of Findings

137. Progress toward our wellness goals and vision is frequently communicated with...

    a.   …CEO or most senior leader
        Yes   No

    b.   …Other C-Suite
        Yes   No

    c.   …VPs and Directors
        Yes   No

    d.   …Managers and supervisors
        Yes   No

    e.   …All other employee groups
        Yes   No

Communication of Findings

138. "Bright spots" and achievements uncovered in the evaluation process are shared and celebrated with...

    a.   …CEO or most senior leader
        Yes   No

    b.   …Other C-Suite
        Yes   No

    c.   …VPs and Directors
        Yes   No

    d.   …Managers and supervisors
        Yes   No

    e.   …All other employee groups
        Yes   No

Continuous Improvement

139. a. Findings are used to improve wellness approaches, resources, initiatives, and communications.
        Yes   No

    b. Potential improvements are discussed with leadership.
        Yes   No

140. We use our findings to shape strategic business decisions. *(For example, quality improvement and organizational strategy).*
    Yes   No

141. Potential improvements are discussed with the individuals or group responsible for supporting employee wellness.
    Yes   No

142. Learnings from evaluation are regularly incorporated into operations planning for our wellness approach.
    Yes   No