



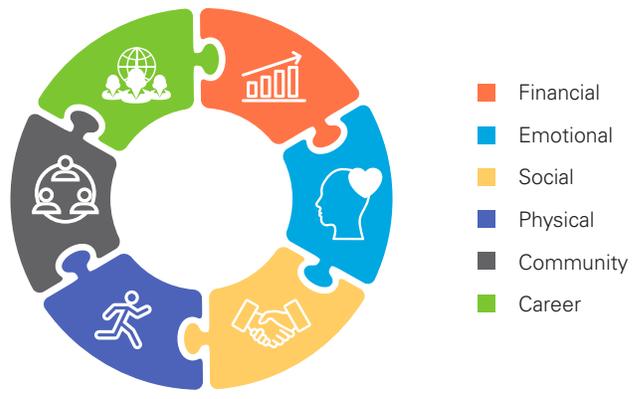
Wellbeing Program Development

Starter Guide for Planning & Considerations

As an employer considers introducing a wellness program to their employees, there are several decisions to consider to ensure that the organization has the sustainable foundation to support any long-term wellbeing initiative.

We believe the term “wellbeing” is a more accurate and complete description of health as compared to the conventionally used “wellness.” Wellness can sometimes stimulate limited perceptions amongst employers who want to focus solely on physical health. Alera Group has embraced the foundational research from the Gallup Organization and the resulting published work by T. Rath and J. Harter,

Wellbeing: The Five Essential Elements, to represent a more comprehensive approach to the idea of being “well.” We encourage employers to consider including elements of career, financial, emotional, social, physical, and community into their “well”being strategies.



Identifying Internal Support

Leadership buy-in is one of the most fundamental elements to establishing a wellbeing effort to ensure long-term support for the program through staffing, budget and resources. Some considerations include:

- Has wellbeing been incorporated into your organization’s mission and strategic plan?
- Is leadership aligned surrounding the wellbeing efforts you are looking to offer?
- Will leadership support employees to participate in wellbeing efforts during working hours?
- Is leadership willing to participate in wellbeing efforts hosted by the organization to act as a role model to employees?
- Will leadership support any financial investment into wellbeing?
- What results is leadership looking to see as an outcome of a wellbeing program?

Middle management support is equally important. Without having supervisor level support, teams can perceive different allowances to participate in wellbeing activities offered by the organization. Having supervisors involved in the planning of wellbeing events or encouraged to allow their reports to participate goes a long way in driving engagement.

- What concerns does your middle management team have about their reports participating in the wellbeing program?
- What communications / resources does middle management need to help support the wellbeing program?
- Is there opportunity to promote wellbeing efforts to middle management teams routinely?
- What resources would middle management need to effectively promote wellbeing efforts?

Establishing a **Wellbeing Committee** is a good way to create a team approach to designing wellbeing activities, communications and engagement strategies, and develop a long-term plan for your organization's wellbeing efforts. Successful committees typically include 5 – 8 people, representing different levels and different locations within the organization. HR can be involved, but it is often encouraged that they aren't the chair of the committee. Steps to establishing a wellbeing committee include:

- Identify a core team of individuals who would be involved in the wellbeing committee from different levels of the organization and representing different locations.
- Members of the wellbeing committee should be at different points in their own wellness journey. Not everyone on the committee needs to be a marathon runner and having individuals who still have goals yet to achieve can provide a great perspective.
- Well-functioning committees typically have consistent meeting times (typically once per month) with additional time to host employee events or activities during the workday.
- Ensure individuals are able to commit to involvement in the committee.
- Identify if there is a defined budget or process for the wellbeing committee to access funds to host or sponsor organization-wide events.
- Develop goals and objectives, along with an action plan to achieve those goals throughout the year.

Evaluating Financial Resources & Considerations

Some medical carriers will be able to offer financial support in the form of **wellness credits**. There are often restrictions on how these dollars can be used, sometimes only towards the carriers' own products or services.

- Check with your consultant as to whether wellness credits are available to your organization.
- Identify if there are any restrictions as to how those credits can be used.
- Evaluate if the medical carrier or other benefit partner(s) offer any wellness / wellbeing focused solutions that might be free or low-cost to your organization.
- Explore community partners or vendors who may be willing to contribute gifts, gift-cards, materials or other resources for wellbeing activities.

Establishing a **financial budget** is another core element if you intend to leverage resources beyond those available through your benefit carriers. This budget could include resources for events and activities sponsored by the committee, resources for your organization to improve health, safety and ergonomics, or career development activities.

- What budget are you willing to denote towards wellness / wellbeing efforts?
- Are there criteria that would need to be met before assigning this budget?
- What is the approval process for any wellbeing committee budget requests?
- Does leadership have any expectations in terms of progress reporting (e.g. participation, results, etc.)?

Program incentives are often an inherent component of wellbeing programs to help drive engagement. Incentives don't always need to be financial-based, but can also include creative solutions like Volunteer Days, Employee Recognition Awards, etc. Consider the following questions:

- Will you be offering incentives for participation in any elements of your wellbeing program?
- Will incentives be in-kind, cash reward, premium-based, etc.?
- Does your corporate budget include an offset for wellbeing program incentives?

There are federal regulations that dictate the limits of incentives employers can award employees in relation to a wellness program. We encourage you to have this conversation with your consultant to ensure that your incentive program aligns with federal guidance.

Defining a Wellbeing Strategy

Collecting data is a good initial strategy to developing a wellbeing program within your organization. Not every group has access to claims data that would identify medical conditions, so there are other methods of getting information to help develop your program. Strategies to consider include:

- Reviewing claims details for behavioral or lifestyle impacted conditions (e.g. hypertension, overweight / obesity, hyperlipidemia, diabetes, etc.)
- Distributing an employee needs and interest survey to evaluate activities or topics that employees would participate in.
- Assessing feedback from leadership and middle management to identify needs within specific areas of the organization and operating teams.
- Biometric screening events can supply the organization with baseline information about health risks amongst the member, but should be used judiciously.
- Identify any cultural considerations within the organization to be considered.

Developing a **Wellbeing Strategic Plan** is a great way to stay on track through the year. It's ideal to help identify SMART goals and objectives for your wellbeing program that are Specific, Measurable, Attainable, Relevant, and Time-Based to guide your wellbeing committee. By creating achievable and attainable goals, the wellbeing committee can demonstrate to leadership their current successes and it provides a stepping stone for future programs as the wellbeing committee continues to have a presence within the organization.

- SMART goals should include the who, what, when, and how of each program activity.
- Think in the long term, not just for this year, but what you would like your organization’s strategy to be over then next 2 – 3 years.
- Consider the outcomes you would like to see from your program and what partners you can work with to help achieve those outcomes.

As your organization or committee develops strategies for the year, consider **initiatives that support the whole person**, addressing all elements of wellbeing. Some suggestions are included in the chart to the right:

- Add programs or solutions that align with your employee’s needs.
- Other elements of wellbeing can have a strong influence on an individual’s health.
- Studies done by Gallup have demonstrated that while 66% of people are doing well in at least one of six areas of wellbeing, only 7% of individuals are thriving in all areas.

Wellbeing	Program Considerations
Financial	Budgeting, Credit Counseling, Tuition Repayment, College savings programs, 401K & Retirement planning
Career	Peer mentoring programs, Job Development and Growth paths, Education support
Emotional	Emotional Assistance Programs, Behavior Health Counseling
Social	Social Activities, Committee-Sponsored Activities, Corporate Events
Physical	Wellbeing Challenges, Gym Membership Programs, Activity Challenges, Nutrition Counseling, Coaching, Wellness Strategies, Disease Reversal Programs
Community	Organization-supported causes, Community Service, Charity Races

Another core element that many employers forget after hosting a wellbeing program, but has massive implications is **evaluating success**. Defining what success means for your program, enables you to measure the impact of your program and whether you have met outcomes along the way.

- Evaluation after the completion of the program enables employers to discern what went well, what could be improved, and how that information can be translated to other wellness initiatives.
- This feedback can be used to make changes to future programs.
- Example definitions of success might include having “X” number of participants attend an event, obtaining 100% satisfaction scores after a program, meeting the goals outlined in the program action plan, or through other means of measurable outcomes (e.g. 10% of participants walked 10,000 steps on average per week during the program).

Communication & Engagement Strategies

Effective communication and **employee engagement** often go hand-in-hand with any wellbeing program. Marketing the program, as you would any other benefit, helps to generate awareness and create enthusiasm about the program amongst your employees.

- Share the “Big-Picture” Reason.** Helping individuals understand the “why” behind the programs your organization is offering can go a long way with creating a positive energy around the solutions you are offering.

- Address “What’s in it for me?”** Encouraging participation in activities, especially health-focused activities, may require an additional nudge. Many employers consider using incentives as an extrinsic motivation. Rewards don’t have to simply be extrinsic, but can also be intrinsic, like personal health goals, long-term weight loss, financial savings by quitting smoking, etc.
- Encourage a Team Spirit.** Creating a team environment with support and accountability can help inspire a communal approach to wellbeing strategies, and may have the added benefit of enhancing the corporate culture as well.
- Lead by Example.** Leadership plays a large role in the success of wellbeing initiatives. By showing up, participating in, or supporting wellbeing initiatives within the organization, leadership can demonstrate the value of these efforts to their employees.
- Keep the Message Straight.** Communicating the desire to be a healthier organization, but bringing pizza in for every staff meeting and have a break room filled with donuts, can create a mixed message to employees about the importance of the wellbeing program. Similarly, promoting better work-life balance, but it’s frowned upon when employees request time off, can derail the sincerity of a wellbeing program.
- Make it Easy.** Adding too many elements to a wellbeing program can make it too confusing and result in employees throwing their hands up and choosing not to participate. For employers just launching into a wellness program, start slow and make it simple to participate.
- Encourage Employee Ownership.** When employees have more control in running the program by offering input, design program elements and communications, they have greater pride in the success of the program. Wellbeing programs should come from employees, rather than a top-down directive.
- Use Any and All Communication Strategies.** Studies indicate important messages should be communicated through 7 different modes at least 7 times for people to hear or grasp the importance of the message. Use any communication strategies that you already have available to you or explore new “out of the box” strategies to help promote your program successfully.
- Make it Fun!**