

The Healthy Workplace Framework for Human-Service Agencies



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Introduction

Healthier employees are good for services and business, and to society as a whole. A healthy workplace that can create and strengthen an enduring link between employee well-being, employee engagement, productivity, and organizational performance, should be the aspiration of all employers and employees.

Human service work is associated with high levels of stress: many of the stressors are unique to the sector, such as compassion fatigue and vicarious trauma (Barford, 2015; Dollard, 2003) which lead to burnout. The HWHP Survey 2017 indicated that 64.0 percent of human services workers in Alberta typically felt unhealthy stress during their workday. Human service agencies therefore often seek to build or expand on existing health and wellness programs.

The *Healthy Workplace Framework for Human Service Agencies* was developed to support nonprofit agencies in the Alberta human services sector in initiating and sustaining their healthy workplace policies and programs. It provides agencies with an easy-to-follow process to implement their own workplace health and wellness programs. While the principles it embodies may be applied in various settings, the framework is intended for use in any Alberta human service workplace.

This *Framework* is aligned with other national and provincial standards, such as CSA Z1003/BNQ 9700-803, *Psychological health and safety in the workplace- Prevention, promotion, and guidance to staged implementation*, and with other documents from recognized organizations, including Consortium for Organizational Mental Healthcare, *Guarding Minds @ Work*, the Canadian Centre for Occupational Health and Safety and Mental Health Commission of Canada, *Psychological health and safety- An action guide for employers*.

Please take time to review this document and use it to create, enhance, and sustain your own healthy workplace.

Purpose

This document is meant to provide management, OHS Committees, and Wellness Committees of human-service agencies, a framework and tools to develop and implement their own workplace health and wellness programs. The goal of policy resources is to provide governing bodies and industry organizations the tools to measure (for regulation) and encourage (for reward) safe psychosocial behaviours. Safe psychosocial behaviours falls under the umbrella of *wellness*. In this view, wellness encompasses both physical health and mental health, although the focus of this work is on mental health. The reason for this focus is to draw attention to a less well known aspect of workplace occupational health and safety, namely psychosocial hazards, stress, and mitigation techniques. Psychosocial health is a key element in overall health and plays a part in all forms of work hazards, including biological, chemical, and environmental.

Moreover, psychosocial health, and the hazard factors that cause it, are threats to the efficient working of human-service agencies. That is to say, because human-service workers face the unsettling and sometimes disturbing work of assisting families in crisis, youth who need counselling, children with inadequate parenting, and children and adults who fall victim to sexual assault, abandonment, and other undesirable outcomes. So much greater, then, is the need for this work to be done by self-supporting professionals in environments that reflect strong teams, supportive management, adequate professional training, and social support. Such environments value knowledge and communication, where sharing, learning, and growing are high priorities. In our project this mentality was suggested by members of the research team as the predominant way of thinking in the nonprofit, human-service sector. Correspondingly, this mentality has driven our work from start to finish and continues to be an approach and outlook that we take in all these materials and in the Healthy Workplaces Framework.

The framework presented here consists of both content and process, and can be implemented by any human-service workplace of any size. It includes principles of a healthy workplace; the two essential cycles of the human services sector (the work cycle for building strong employees and the wellness cycle for building a strong agency); components of the framework, and steps in developing, implementing and evaluating a wellness program. It also include sample forms used for organizational and individual assessment, action planning and evaluation. Suggestions for wellness programs, which were derived from our *Be a Wellness Leader* workshops are mentioned as well. Individual agencies, however, may need to adapt these recommendations to their own workplace, their own culture, and their own needs.

An Information Systems Approach

The framework presented in this document, and that resulted from our research project, is an information management systems solution. That is, it depends on creating flows of information about wellness and employee engagement among all the departments and persons in an agency. That flow of information can, if done explicitly and carefully, create knowledge about an agency, its workers, its stressors, and other important elements. Knowing this information can help an agency become a "learning organization."[\(Santora and Sarros 2012; Delahaye 2011\)](#)" As an agency employees study this document, it is helpful to see the solutions presented here as being "information based." Flowing information creates discussion and deliberation among employees. The result of these deliberations can be seen as a consensus of understanding--about stressors, jobs, employees, interventions, and other wellness-related topics. Agencies that gather and implement this knowledge effectively can continue to develop and grow and, as is discussed below, can begin to build a reputation as healthy environments. This, under thoughtful, executive leadership can build knowledge capital, or revenue generating understandings of its processes. [\(Delahaye 2011; Coleman 2000\)](#)

As employees and leaders work through this manual, they should look for ways to encourage both the flow of information, but also the recording of it. Only through recording

information, analyzing it, and acting on it can an agency develop information capital. ([Tittenbrun 2014; Peppard 2005](#))

Users

This document can be used by multiple persons with different roles to play in developing and implementing healthy workplace programs.

At the smaller scale, wellness ideas generated from framework elements can be discussed among employees themselves in formal and informal conversations. Wellness committees can take ideas of wellness initiatives and follow simple steps of the Wellness Cycle to implement wellness activities and programs for a small group of workers. Wellness initiatives can be expanded to the whole agency with greater management involvement and policy development at the organizational level. At last, agencies can customize the framework and build their own “wellness pillars.”

We also intend these resources to be starting places for development of wellness policy and regulation by governmental, municipal, certification, and insurance stakeholders. These groups require both auditing and measurement data and tools to support legislative initiatives and regulations, as well as best practices to support recognition programs.

Background: The Healthy Workplaces For Helping Professions Project

The HWHP project is funded under the OHS Futures funding program of the Alberta Ministry of Labour. The overarching goal is to increase the health and wellness capacity of nonprofit agencies in the Alberta human services sector. We believe this can be done through both reducing occupational stress and strengthening individual and organizational factors that may mitigate the negative effects of stress in human service employees.

We used a participatory approach with multiple disciplinary teamwork to resolve the issue of building one workplace health in a very diverse sector. This sector contains six different sub-sectors with different characteristics but shared common values. These sub-sectors include:

- Child and Youth Counselling Services
- Child and Family Services
- Home Visitation Services
- Disability Services
- Women Shelters
- Sexual Assault Services

In order to reach front-line workers of all sub-sectors, we worked closely with agency-membership associations, such as ALIGN, ACDS, AHVNA, CYCAA, ACWS, and AASAS, taking advantage of the expertise of their leaders to help tailor project activities.

The interdisciplinary/transdisciplinary approach is shown to be effective in resolving “real world, complex problems” and multiple disciplinary teamwork is necessary to provide different perspectives on a problem (Pohl and Hardorn, 2008; Choi and Pak, 2006).

The project has been implemented in three phases. In the first year, a survey was carried out with agency workers, with results used to develop knowledge mobilization resources and intervention programs in year two. Year three features a province-wide conference, at which results and outcomes from interventions with our partner agencies and organizations are showcased. Main interventions in year two include the *Wellness Pathway* program (formerly the *Research Partnership* program) and the *Be a Wellness Leader* program.

The Wellness Pathways Program

This program is designed for leadership in agencies. It provides pathways to leadership involvement and policies. We partnered with three Alberta nonprofit organizations, worked together through the steps of what we call the Wellness Process, to develop a strategic intervention model which was applied by these agencies to build individual frameworks of their own.

The Be a Wellness Leader Program

This program comprises a series of training workshops and activities for staff and managers. It builds on what we learned from over 100 professionals across the province, in many different work settings and services, who shared their wellness practices with us. The BWL program provides five Wellness Pillars for the Healthy Workplace Framework.

The HWHP Healthy Workplace Framework

The HWHP Healthy Workplaces Framework is the main outcome of the participatory progress that we researched with employers and employees of nonprofit human services agencies. It lays out the elements (Wellness Pillars), the process (Wellness Process), and the people (Wellness Leadership) that are essential for designing, implementing and evaluating any wellness program in the workplace. This framework covers major aspects of the work environment but is flexible enough for the agencies to adapt and grow.

At the heart of the Healthy Workplace Framework is the Wellness Capacity Maturity Model. That model is based on the wellness process and creates benchmarks called "levels" that can help agencies and regulatory bodies identify stages of development. It also can help by providing best practices that can help an agency move from one level to the next.

Five Levels of Wellness Process Maturity

Level	Outcome	Characteristics	Transition to Next Level
Level 1: Defined	Wellness depends on the heroic efforts of individuals, which could result in burnout.	<ul style="list-style-type: none"> Jobs are clearly defined Employees are aware of stress hazards Wellness goals and standards are defined for individuals The Helping Professional Value Cycle is defined The primary emphasis in the agency is on client service No formal structure to address wellness <p>The agency is characterized by a random, individualized approach to wellness. It may be dependent on heroic individuals but is not systematic or strategic. Momentum is erratic and vulnerable to turnover.</p>	Identify common/shared stressors. Engage employees in agency goal setting. The agency is committed at the managerial level to wellness.
Level 2: Written	The agency and employees rely on mutual definitions of wellness with little effort to grow.	<p>Level 1 plus:</p> <ul style="list-style-type: none"> Commitment in wellness in writing Wellness goals and standards are defined for agency Agency is committed to a consistent wellness process Wellness becomes a part of the mission of the H&S Committee (or formal, all level group) <p>The agency is characterized by a growing awareness of the value of employees as a balance to the value of clients.</p>	Agency needs to define evaluation criteria for wellness initiatives.
Level 3: Reviewed	Capacity is increased because the agency adapts to changes in employee wellness needs.	<p>Level 2 plus:</p> <ul style="list-style-type: none"> Wellness policy is reviewed regularly Wellness goals are reviewed regularly Wellness policy review is conducted by the H&S/Wellness Committee <p>The agency is characterized by a culture of "plan, do, review" driven by wellness goals. Wellness initiatives are based on experience and agency strategic goals.</p>	Wellness policy endorsed by all agency units. Records of success are kept and used to inform future initiatives.
Level 4: Trained	Capacity is ongoing in an agency at training and human resources levels.	<p>Level 3 plus:</p> <ul style="list-style-type: none"> Employees and managers are trained in the agency wellness process Employees are hired and evaluated based on their ability to contribute to the overall wellness of the organization. Employees are trained in wellness policy administration <p>The agency is characterized as a systematic wellness learning environment.</p>	The agency formalize wellness evaluation process. The agency publicize and promote wellness in the industry
Level 5: Evolving	The agency gains a reputation as a healthy place to work. Wellness becomes a primary component of agency culture.	<p>Level 4 plus:</p> <ul style="list-style-type: none"> Wellness becomes a strategic goal for the agency Wellness outcomes are continuously evaluated and improved The agency is known for its employee-centered wellness programs and policies and assumes the role of industry leadership The primary emphasis in the agency is on employee value Wellness policy outcomes contribute to the knowledge capital of the agency 	Continuing efforts to improve all practices throughout the organization. Special focus on employee value. Strong and sustainable commitment to continuous wellness process improvement.

Profiles of Wellness Leaders

Portrait of a healthy employee

Joan is a female family counsellor working in child and family services sector. She is 55 years old and has been working for her agency for almost 10 years. Her organization provides her with reflective and supportive supervision, great opportunities, support for self-care, and open communication about workplace health issues, and she also has a great deal of control in her scheduling of time commitments. She takes care of her own physical and mental health to maintain resiliency, remains professionally capable and qualified to do the work, while often sharing creative ideas with her colleagues.

Portrait of a healthy organization

Mountain View Family Services is an agency that provides residential services, manages foster care, and handles case-based family intervention. The organization has a Health and Wellness Committee that works with all organizational units to promote wellness issues. Recently the Committee surveyed employees about the kinds of social support employees enjoy, and sponsored a "Spring Fling" social gathering. From the evaluation cards left at the event, the Committee members were able to find out if the activity met its target goals ("Helped Teams, Helped Individuals, Helped the Agency"). The Committee reports to the Board on wellness issues and advises HR on hiring and training on wellness issues.

Mountain View Family Services has worked with health and safety partners to achieve Government of Alberta, Certificate of Recognition and enjoys reduced WCB premiums.

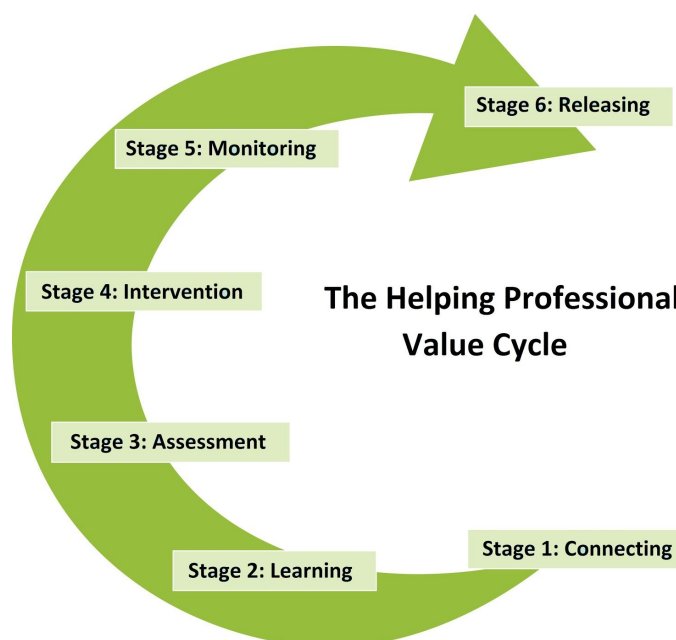
Components of the HWHP Healthy Workplace Framework

People often think of wellness as primarily an end result or a goal for which an agency and its workers should strive. While it is true that employees want to feel psychologically healthy and mentally well in their work, and that an agency should do its best not to create conditions in which stress occurs, it is also productive to see wellness not as an *outcome* but as a *process*, a cycle of activities that contribute to wellness as an outcome and grow culture.

Health and wellness, in HWHP's approach, is not an end goal but a result of this healthy process for involving individuals at all levels of an agency in a set of activities that lead to health and well-being of employees and of the organization. This process is repeated and matures as an agency employees learn and grow its capacity to run the wellness cycle.

The Core: The Helping Professional Value Cycle

Employee value is the foundational block of any healthy workplace program. A healthy workplace must be built on the core value that employees provide for the agency. In many agencies, the "value" of the agency is often seen as the value that it provides for clients: counselling, referral, care, and so on. This value often defines the agency and is the basis for funding and return on investment. Another way to see value is to look at the agency as a group of committed persons who, in their daily jobs, enact a cycle of activities that represent the "good" that employees offer to clients. We call this cycle the "Helping Professional Value Cycle."



According to this thinking, employees follow a roughly similar process when new clients--youth, families, teen mothers and fathers--become available or apply for help. The core value of human service work and social work is the value cycle that all front-line staff undergo in their daily work, and describes the interaction of helping professional with clients. We built this cycle based on models found in the literature. ([Kotarba and Bentley 1988](#); [Zigarmi et al. 2009](#)) Different agencies may have different name for the cycle but main tasks include the stages in Table X.

Table X: The Helping Professional Value Cycle

Stage in the Value Cycle	Sample Job Tasks
Stage 1: Connecting (with clients)	<ul style="list-style-type: none"> ● Represent the program ● Conduct client intake and build rapport
Stage 2: Learning	<ul style="list-style-type: none"> ● Research, investigate and explore
Stage 3: Assessment	<ul style="list-style-type: none"> ● Consult with other professionals ● Provide necessary assessments and screenings ● Provide diagnosis
Stage 4: Intervention	<ul style="list-style-type: none"> ● Provide ongoing consultation, treatment, and problem-solving ● Coordinate resources
Stage 5: Monitoring	<ul style="list-style-type: none"> ● Monitor and maintain standards and practices ● Evaluate
Stage 6: Releasing	<ul style="list-style-type: none"> ● Follow-up and make recommendations ● Terminate services

This process makes up day-to-day work of many helping professionals. Any wellness program in the workplace must aim at promoting a healthier value cycle, as keeping it strong means strong employees, hence a strong agency and excellent services to clients.

This process or cycle can become endangered or threatened at any stage due to the nature of human service work. Hazards such as inadequate resources, lack of time, increases or fluctuations in caseloads, or conflicts with other employees can impede the worker in performing these tasks. In our workshops in the HWHP project, we repeatedly heard staff members say, "I get stressed about my work, but if all I had to do was come to work each day and do this [indicating the value cycle] then I wouldn't feel stress." But the stress comes when extra demands in the workplace cause the worker not to be able to do his or her job.

The Job Demand vs. Resources Model of Stress

In the Healthy Workplaces project we applied the job demands versus resources model of stress. ([Xanthopoulos et al. 2007](#); [Brauchli et al. 2013](#)) Following this model, an employee's stress level is determined by two things: the resources to do a job, and the demands that that job imposes. For example, if an employee has a conflict with external partners, such as legal groups or other service agencies, then the implementation or monitoring phases of the helping cycle will be compromised and the employee may feel stress.

In the workshops we conducted in the HWHP project, we asked participants to identify their employee value cycle: the stages they go through in working with clients. Everyone will be slightly different in how they define their sequence or job process. Then we asked participants to identify elements that caused stress at various stages or points of transition. Frequently these elements or hazards were lack of adequate time, lack of supportive supervision or team support, or lack of professional qualifications for the assigned job. We then asked participants to examine areas such as self-care, strengthening team work, using agency resources--such as employee assistance programs--that they could strengthen in order for them to meet the demands of their job.

Understanding stress as a function of impediments to a person doing their assigned work or following their chosen job cycle is a key starting place for wellness interventions with employees. Identifying stressors in relation to this core work process has implications at both the individual and agency level. At the individual level, knowing stressors is an important step to take in order to take charge of and identify one's own responsibility for wellness. Employees can identify their own stressors and help colleagues identify theirs. At the agency level, supervisors, managers, and health and wellness committees need to recognize that wellness begins by providing adequate resources to individuals and teams, and that, by doing so, they enhance the overall wellness of the agency.

Primary Driver: Wellness Leadership

Leadership is about creating and facilitating an environment in which all employees are inspired and engaged, and work together to achieve optimal workplace health. In the *Healthy Workplace Framework*, employees and employers share the responsibility for creating a healthy workplace. Leaders at all levels, who are committed to the Wellness Cycle, will form the Wellness Committee. The Committee's role is to represent all levels of an agency, and to initiate, implement, and evaluate wellness programs.

Depending on specific situation, and agency can consider establishing a Wellness Committee with members representing key groups in the organization, including front-line employees, management, HR, and the Health and Safety Committee/ Social Committee, or using the existing Health and Safety Committee.

Five Wellness Pillars

Wellness Pillars comprise the five elements of the HWHP Healthy Workplaces Framework. They represent outcomes of the Framework and reflect the content of a healthy workplace program. To create a healthy workplace, an agency and its Wellness Committee should consider addressing some or all five pillars in their wellness programs. An agency, however, may not have the need to address each of these pillars all the time. What pillars to be used must be considered based on the needs and preferences identified through the assessment step of the Wellness Process. Individual agency can also adapt these pillars to their needs. Examples of wellness initiatives and activities based on these five pillars at the organizational level and at the individual level are given in the Appendix.

Know Your Challenges

Perhaps the number one barrier for seeking solutions for stress is lack of knowledge and awareness. Human services workers may have work-related stress without knowing about it, or do not fully understand those issues. Employers and employees may not see the impact of a healthy workplace intervention on the quality of services they provide.

This pillar focus on increasing knowledge and awareness about basic issues of health and wellness, including:

- Identifying common hazards and risks in the sector
- Identifying strengths of the sector
- Finding links between wellness and performance
- Understanding your passion and performance
- Identifying stressors and solutions to stressors

Support for Self-Care

Self care is a key component of employee wellness and is something every human-service worker should practice. But sometimes self-care is seen as a fix or a remedy for workplace stress, which can limit its effectiveness. Self-care that leads to greater employee engagement and that leads to healthy outcomes overall means that the worker needs to plan for self care, and evaluate the effectiveness of these interventions.

The self-care pillar covers: the six components of self-care: workplace, physical, emotional, spiritual, psychological, and relationship aspects.

- Assessing daily risks using the Daily Risk Assessment tool
- Identifying individual actions for self-care
- Taking a proactive approach to self-care
- Taking a "work/life blending" approach to life and work

Build a Strong Team

Strong teamwork is key in the human-service sector for many reasons, but mainly because having a supportive team creates an environment where resources can be shared and stressors mitigated.

This pillar includes all activities that aim at improving work relationships, specifically:

- Building trust and respect
- Resolving conflicts
- Improving communication
- Sharing ideas and experiences

Improve Resource Efficiency

Resources means the supportive environment, health services, information, social services, employee assistance programs, and opportunities and flexibility that an agency provides or makes available to staff to support or motivate their efforts to improve or maintain healthy practices. Wellness resources include agency resources, benefit provider resources, educational resources, professional resources, and community resources. Wellness initiatives in this category focuses on making the most of use of agency resources, including:

- Providing services
- Making resources accessible to employees
- Encouraging the use of resources
- Ensuring that resources address all concerns of employees
- Putting necessary policies in place and enforce them

Communicate Wellness Ideas

While effective communication can reduce stress, wellness issues, especially tough and personal health issues, were rarely discussed at workplace (HWHP Survey, 2016). Wellness initiatives should also create channels for sharing wellness ideas, tips and strategies for managing stress, and success stories amongst staff. Wellness communication can happen in various forms:

- Story writing and telling
- Training
- Staff meeting
- Face to face
- Social media

Examples of Wellness Leadership

Examples of organizations incorporating five pillars in their healthy workplace programs:

- Alberta Blue Cross has been recognized as one of Alberta's workplace wellness champions. Their healthy workplace initiatives range from providing online health risk assessment tools for employees, promoting healthy eating, providing on-site fitness

facilities and encouraging their use, organizing wellness challenges, and improving health and safety of work environment, to sponsoring employee participation in community events.

- Glenrose Rehabilitation Hospital sets up a Work on Wellness committee which consists of all levels of management and front-line staff. The committee develops and implement a wellness program covering five areas of wellness (physical, intellectual, spiritual, emotional and social) with activities including: yoga classes, meditation and mindfulness classes, renovation of Staff Fitness Centre, development of healthy workplace guidelines, wellness tools and resources available via the intranet site, and team building activities.

Examples of wellness ideas for each pillar are provided in the Appendix.

The Agency Wellness Cycle

The wellness cycle consists of steps that an agency should follow when developing, implementing, and evaluating their wellness programs.

This process includes the following stages:

- Needs assessment and analysis
- Planning
- Implementation
- Review and evaluation



Stage 1: Needs assessment and analysis

This stage includes surveying employees and the organization, gathering available data and document, discussing within the team, and consulting external experts. Data and results are analyzed for decision making.

- Survey: Identify workplace health issues, eg. overall health, job satisfaction, levels of stress, stressors, mitigating factors
- Organizational review: gather available data and documents, eg. policies, reports
- Analyze data and results
- Report: Identify gaps and review results within Wellness Committee and with management and employees

Stage 2: Planning

In this stage, the Wellness Committee develops a wellness strategy and plan for a wellness initiative that will best address the needs identified through the assessment stage and based on five Wellness Pillars.

Planning includes:

- Setting goals based on survey information
- Identifying activities that look like they would help the agency achieve the goals

- Identifying policies or procedures that are needed to implement the intervention
- Developing an implementation plan

Stage 3: Implementation

The Wellness Committee implements the planned activities and monitors the implementation. Reviews must be done to identify any obstacles and make adjustments needed.

- Promoting and implementing planned activities
- Monitoring the progress of the event or activity
- Reviewing and adjusting

Stage 4: Review and evaluation

This stage is done at the end of a wellness initiative and involves evaluating the outcomes against the Wellness Pillars.

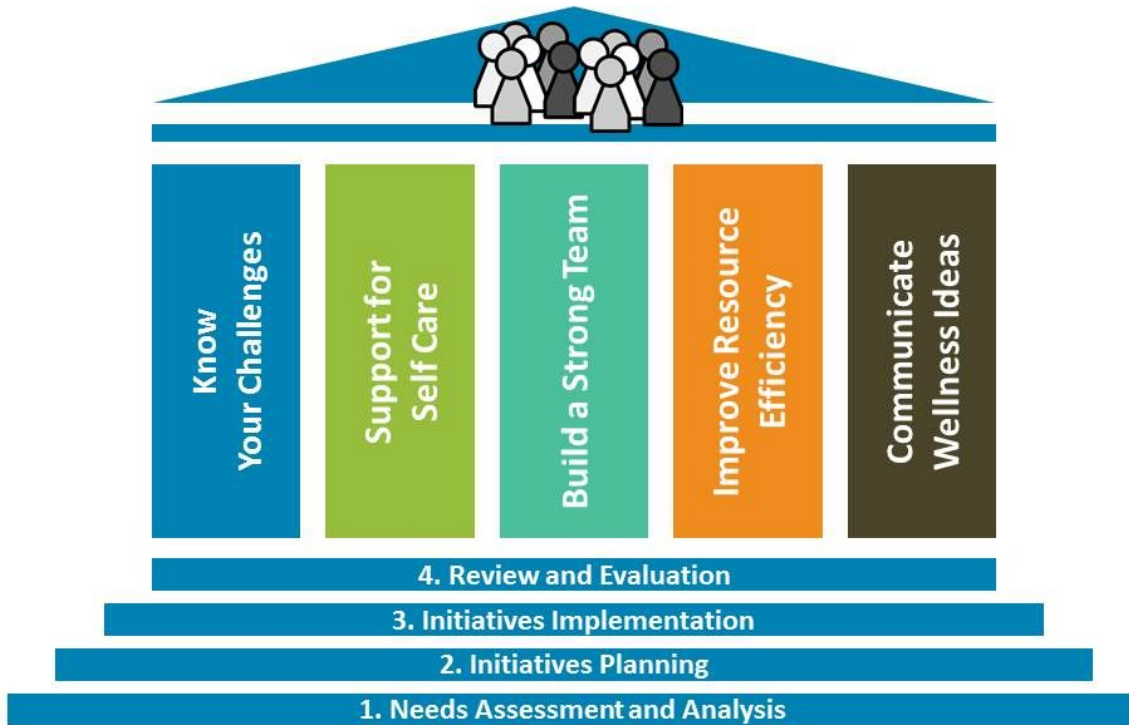
- Evaluate: Determine if plan has been properly implemented, if goals have been met, and measure initiative effectiveness against the Pillars.
- Revise: Make recommendations for the next initiative and start the wellness cycle over again.

Tools and guidelines on how to implement these steps are in the Appendix.

The Healthy Workplace Framework for Human-Service Agencies

The following figure graphically represents three components of the HWHP Healthy Workplace Framework: wellness leadership, the wellness pillars, and the wellness cycle. This framework was developed from surveys nearly 600 employees and discussions with over 150 individuals in 35 organizations in the human services sector from the year 2015 to 2016.

Using this framework as a guideline, with a combination of passion and creativity, human-services agencies can develop and implement workplace health and wellness programs. Whether an agency wants to begin with a small initiative, or chooses to start a big program, it is important that employers and employees at all levels share the leadership responsibility for creating a healthy workplace. Wellness initiatives/programs are built on and evaluated against the wellness pillars. The wellness cycle is followed to achieve excellence in programs and continuously improve.



Taking Action to Build a Healthy Workplace Framework

Supporting organizational wellness requires an agency to follow a process that involves continual improvement and incorporates participatory action research and knowledge mobilization. It is an iterative process that demands that wellness staff members plan, act, review, and continually improve on the program activities. That process starts when a wellness leader emerges who is willing to contribute time and managerial skills to begin to build business systems around wellness information models. The following section outlines the characteristics of such a leader and provides an outline of the work, which we call the Wellness Pathway. Following the stages of the Wellness Pathway (which itself is built on sound managerial principles of planning, doing, and reviewing) will, theoretically, establish the process within the agency.

To follow the process once through should be enough for it to catch hold and become the basis for subsequent iterations. In this way an agency builds wellness capacity *as a process* that they agency can then use to build wellness knowledge capital. Many agencies already have such processes in place, so following the stages outlined here may be seen as a way to formalize and add evaluative power to existing business processes. Certainly opening channels of communication among employees, divisions, and community stakeholders should be an end in itself and can afford many benefits to an agency, regardless of the focus

on wellness. As we found in our project work, however, employees in the nonprofit human-services sector of Alberta valued engagement, communication, strong teams, reflective supervision, and other indicators of vibrant human resources management. The materials in this Framework are intended to support the building of capacity in precisely these ways.

The Role of the Wellness Leader

In our project we talked a lot about leadership. Leadership can be looked at in a variety of ways, but primarily in the following three: executive leadership, managerial leadership, and staff and employee leadership. All these forms of leadership share the idea of a vision, a change agenda, and a desire to spread the word about wellness in an agency. But for the process of wellness to move forward, someone, such as a department manager or operations director should take on the responsibility for scheduling and management. In our project this role fell to the project lead, who enlisted participants, managed times, locations, and agendas, and reported on progress from the start to the end of the project.

Sometimes the motivation to move ahead with a wellness project will come from the top, from what an employee heard at a professional meeting, or acquired through continuing professional education. Regardless of the inspiration for change, the leader of a wellness initiative needs to embody the commitment to carry forward through the process at least once, with the intention of passing the torch of wellness to another employee or to the wellness committee as soon as possible. Wellness should evolve in an agency into a culture of engagement, looking out for one another, and reporting and overcoming hazards: all organized around the desire to mature the wellness process. Only in this way can wellness become a strategic, information-based system that, ultimately, drives service delivery and transforms the agency.

The transformation of the agency often follows a pattern of movement from being a service-oriented enterprise to being an employee-oriented enterprise. This movement or change embodies a purpose that, if properly communicated to others and allowed to flourish in its own way in an agency, will lay the foundation for the growth of wellness culture.

Set up a Team

A group of key people at all levels, who are interested in and committed to taking the leadership role, forms the wellness committee.

- **Members:** The committee should include members who represent both management and front-line staff, and represent the Health and Safety Committee and/or the Social Committee. If wellness program is implemented on a small scale, the pre-existing HSC may be able to take on this additional role. In a large organization, it is better to establish a separate committee, but it is necessary to ensure that there is integration and cooperation between the committees.

- Roles: The committee is responsible for running and refining the wellness process: initiating, implementing, and evaluating wellness programs in the agency. The committee is also responsible for keeping management informed of the program and communicating program plan and activities across the organization.
- Requirements: Each member is expected to committed their time (certain hours per month) towards committee activities, including attending committee meetings and other assignments (collecting data, writing reports, etc.).
- Activities: The process of initiating a meeting starts with a schedule of 7 meetings. Each of these meetings, as is detailed below, constitute progress towards building a wellness policy in the agency, and also constitute a first run-through of the wellness process.

The Wellness Pathway

The Wellness Pathway is a series of meetings and discussions and data collection that lead to a wellness framework. The intention is to customize the wellness process so it accommodates the agency and its employees. The intention is also to establish information categories (wellness outcomes, factors that affect health and wellness in the agency) for the specific agency. Each of the activities or meetings is based on 1) a discussion of what the team members have learned, 2) plans for what the members need to know or do to move ahead, and 3) action items (like reviewing, outlining, surveying, discussing or whatever) that the members need to do before the next meeting.

1st Meeting: Kick-Off

This is the first time when wellness committee members meet each other with the participation of leadership and frontline staff. The wellness concept is introduced. Participants discuss the current situation of the agency and lay out the steps for research planning.

- Research planning: Research can consist of two types of investigations: environmental scans and surveys .
 - An environmental scan is a collection of information about the agency that is going to inform wellness surveys and activities. Topics like: numbers of employees, wellness initiatives in the past, job descriptions, and organizational diagrams can help a committee decide on what questions to ask in the survey.
 - A survey is a formal questionnaire that asks about wellness in an agency. The survey is usually made up of a question about a health outcome, and questions about factors that create that outcome. The easiest question to ask is "How healthy do you feel in your job?" The survey should also ask persons about what factors they think influences their response to the outcome question.

Get Support and Mobilize

A wellness program will not be successful if it lacks support from senior management. That support embodies the ability to gather information about and report on wellness outcomes. Establishing the wellness committee, even if it is just a working group, is a first step in creating a channels of communication and structures for corporate learning.

After being set up, the committee identifies and talks to major stakeholders and key executives to gain commitment and support. These people include:

- Management
- Health and safety professionals
- Human resources professionals
- Employee Assistance Program (EAP) providers
- Medical or occupational health staff
- Others

The committee also identifies resources needed for program implementation and mobilizes support from key stakeholders. Results of this step are not merely the permission for implementing a wellness program. Leadership commitment should result in the development and adoption of a wellness policy which is well communicated to staff, and the provision of necessary resources (people, time, money) for the wellness program.

Activities:

- Explain the wellness and healthy workplace concept to key leaders in the organization
- Get buy-in from the senior management and employee representatives
- Get a commitment for time and resources to implement wellness programs
- Get permission to conduct surveys and meetings with employees in order to identify needs
- Ensure that health and wellness issues are addressed in a policy
- Ensure that resources are allocated for wellness programs and activities

Assess current wellness level of the organization and of employees

Baseline data on the current wellness level of employees and of the whole agency should be collected in order to:

- Identify needs and expectations, which will be used for developing targeted wellness interventions
- Help monitor progress by demonstrating change over time
- Determine the success of the wellness program

The present situation of wellness of the organization can be assessed using a number of tools. Depending on the size of the organization and the program, baseline data can be collected by using various methods, including:

- Conducting a formal or informal survey
- Holding group discussions

- Conducting interviews or reviewing interview transcripts or summaries
- Holding informal staff meetings, informal talk
- Reviewing existing sources (attendance records, injury reports, health care claims, etc.).

Whatever data collection methods are used, it is important that all groups of employees have opportunity for input.

Assessment results are used to identify employee needs and preferences in regards to wellness programs. Data is analyzed based on the Wellness Maturity Model and Five Wellness Pillars of the HWHP framework.

Activities:

- Conduct an organizational review
- Conduct a survey and other formal assessment
- Gather administrative data
- Analyse results
- Discuss assessment results among the committee and present to leadership
- Develop a healthy workplace program plan: Plan what to do with assessment results

Resources

Sample kick-off meeting agenda

Sample research planning worksheet

2nd Meeting: Data Analysis and Planning

In this meeting, the committee discuss assessment results and identify areas for intervention, based on assessment results and the wellness pillars as the key elements of the program. The group must also set priorities among the many issues identified if there are too many problems to deal with at once. The next step is setting goals and objectives of the wellness program, as well as determining opportunities and barriers to achieving the stated goals and objectives. Lastly, the participants plan possible activities to address wellness goals.

Resources

Sample survey. This sample focuses on one or two key outcomes and asks respondents to suggest or choose factors that inform their responses to the key outcomes question. For example, if the survey asked "How healthy do you feel in your work at our agency?" then there should follow questions about what factors (time pressures, job ambiguity, lack of training, inadequate planning, scheduling conflicts) lead to that outcome. The intention should be to categorize employees into stressed and unstressed, and then evaluate what can and can't be done to mitigate the hazards the employees face.

Sample Data analysis and planning meeting agenda. This agenda illustrates the "discussion, planning, action" format that the committee will follow at subsequent meetings.

Sample Activity Plan. This

Plan, Implement and Evaluate an Intervention/Initiative

Once the program plan has been developed and communicated to management and staff to get their opinions, the Wellness Committee select activities for an intervention/initiative.

Things to take into consideration in selecting an initiative include:

- The extent to which it addresses
- The opinions and preferences of managers, workers and other groups
- Resources (time, financial, human) required for the intervention.
- The possibility of making a difference (programs with proven effectiveness from other agencies)

Even though a short-term program with one component alone is not usually sufficient to create impact, an over-ambitious intervention increases the expectation to achieve goals, which in turn, can result in feeling of stress and reduce the motivation. For the first time, the committee may choose an intervention that does not require too much resources and the timeframe does not exceed 1 year.

Resources

A list of wellness initiatives can be found in [Appendix xxx](#).

Planning

The next step is setting out a plan with all activities and a timeframe for implementation (Implementation plan/ Action plan). The required budget, facilities and resources need to be included in the implementation plan, as well as assigned responsibilities. The committee needs to plan for a launch and promotion of the intervention and any new policy and training. An evaluation plan for the initiative (s) should also be included.

Activities:

- Develop an implementation plan
- Review and finalize the implementation plan

3rd meeting: Implementation plan review

Implementation and monitoring

This step refers to implementing the plan agreed on the 3rd meeting. The committee monitors the progress of the intervention and makes changes to the plan if necessary. A mid-term review is carried on to review the project status against the plan, assess what have been accomplished and problems till date.

Activities:

- Implement the plan

- Write a progress report

4th meeting: Progress report review

In this meeting, participants review the progress, results and issues, identify areas for improvement and make necessary changes to the original plan. Meeting participants also plan for project evaluation.

Evaluation

This step includes evaluating both the process and the outcomes of the intervention, and report on the its effectiveness. The intervention should be evaluated against the wellness pillars and the evaluation plan. Evaluation results are then compared to baseline data to determine whether the extent to which the intervention has impacted on wellness levels of employees and of the agency. If the intervention's scale is too small, the evaluation can simply be done by asking workers if they think it worked, why or why not, and what could be improved.

Activities:

- Develop an evaluation plan
- Conduct an evaluation
- Analyse results and write evaluation report

5th meeting: Evaluation planning review

The purposes of this meeting are to review and agree upon tools that will be used for evaluation, and how evaluation results will be analyzed to see if the goals have been met.

Develop a Framework

An agency can decide to continue using the HWHP framework or adapt the HWHP framework to their current situation. A framework should consist of three components: the people (wellness committee), the elements (wellness pillars), and the process.

6th meeting: Program framework review

The purposes of this meeting are to review the framework and use it to plan for next initiatives.

Plan for Next Steps

Based on what have learned from the evaluation results as well as throughout the project implementation process, the wellness committee identifies what should be continued, stopped, or revised. The committee plans for the next initiative and start the wellness process over again.

Sample Intervention: Taking Action To Support Staff Wellness

Wellness initiatives at the individual level are supported through the Be a Wellness Leader Program (BWL). With the emphasis on the five wellness pillars, the workshop built capacity for individual employees by guiding them through *a path to become a wellness leader*. The workshop uses a participatory approach which encourages reflective activities to reinforce learning and support long-term achievement. It provides tools and resources for agencies to implement capacity building interventions and activities with their employees.

A path to become a wellness leader

1. Understand basics of wellness and hazards
2. Improve your self-care
3. Build stronger relationships at workplace
4. Use wellness tools and resources
5. Share your wellness leadership story

The BWL program covers five modules:

Module 1: Basics of health, wellness, and stress

- Hazards and risks in the human-services sector
- Strengths of the sector
- The Helping Profession Value Cycle
- Your wellness and your performance
- Basics of leadership
- Planning for leadership actions

Module 2: Self-care for helping professionals

- Self-care in helping professionals in Alberta
- Defining self-care
- Components of self-care: self-care wheel
- Planning for self-care
- Work-life balance vs. work-life blending
- Planning for leadership actions

Module 3: Building healthy work relationships

- Identifying your work relationships
- 'Elements of a healthy work relationship
- Assessing your work relationships
- Improving your work relationships
- Resolving conflicts at work
- Planning for leadership actions

Module 4: Making the most of wellness resources

- Agency resources
- Benefit provider resources
- Educational resources
- Professional resources
- Planning for leadership actions

Module 5: Communication for health and wellness

- Communication, wellness and leadership
- Storytelling and story writing: shaping wellness messages
- Planning for leadership actions

The workshop materials (powerpoint presentations and the workbook) can be used in various ways:

- Formal training: one full-day workshop or five 2-hour workshop series
- Incorporate into staff meetings
- Topic talks

APPENDIX: SAMPLE FORMS

Five Levels of Wellness Process Maturity

Level	Outcome	Characteristics	Transition to Next Level
Level 1: Defined	Wellness depends on the heroic efforts of individuals, which could result in burnout.	<ul style="list-style-type: none"> ● Jobs are clearly defined ● Employees are aware of stress hazards ● Wellness goals and standards are defined for individuals ● The Helping Professional Value Cycle is defined ● The primary emphasis in the agency is on client service ● No formal structure to address wellness <p>The agency is characterized by a random, individualized approach to wellness. It may be dependent on heroic individuals but is not systematic or strategic. Momentum is erratic and vulnerable to turnover.</p>	Identify common/shared stressors. Engage employees in agency goal setting. The agency is committed at the managerial level to wellness.
Level 2: Written	The agency and employees rely on mutual definitions of wellness with little effort to grow.	<p>Level 1 plus:</p> <ul style="list-style-type: none"> ● Commitment in wellness in writing ● Wellness goals and standards are defined for agency ● Agency is committed to a consistent wellness process ● Wellness becomes a part of the mission of the H&S Committee <p>The agency is characterized by a growing awareness of the value of employees as a balance to the value of clients.</p>	Agency needs to define evaluation criteria for wellness initiatives.
Level 3: Reviewed	Capacity is increased because the agency adapts to changes in employee wellness needs.	<p>Level 2 plus:</p> <ul style="list-style-type: none"> ● Wellness policy is reviewed regularly ● Wellness goals are reviewed regularly ● Wellness policy review is conducted by the H&S/Wellness Committee <p>The agency is characterized by a culture of "plan, do, review" driven by wellness goals. Wellness initiatives are based on experience and agency strategic goals.</p>	Wellness policy endorsed by all agency units. Records of success are kept and used to inform future initiatives.
Level 4: Trained	Capacity is ongoing in an agency at training and human resources levels.	<p>Level 3 plus:</p> <ul style="list-style-type: none"> ● Employees and managers are trained in the agency wellness process ● Employees are hired and evaluated based on their ability to contribute to the overall wellness of the organization. ● Employees are trained in wellness policy administration <p>The agency is characterized as a systematic wellness learning environment.</p>	The agency formalize wellness evaluation process. The agency publicize and promote wellness in the industry.
Level 5: Evolving	The agency gains a reputation as a healthy place to work. Wellness becomes a primary component of agency culture.	<p>Level 4 plus:</p> <ul style="list-style-type: none"> ● Wellness becomes a strategic goal for the agency ● Wellness outcomes are continuously evaluated and improved ● The agency is known for its employee-centered wellness programs and policies and assumes the role of industry leadership. ● The primary emphasis in the agency is on employee value ● Wellness policy outcomes contribute to the knowledge capital of the agency 	Continuing efforts to improve all practices throughout the organization. Special focus on employee value. Strong and sustainable commitment to continuous wellness process improvement.

Program Kick-off Meeting Agenda (Sample)

Date

Location

Attendees

Team leads:

Agency staff:

Others:

Purposes of the meeting

- Team building
- Identify starting places in wellness program development
- Plan for action

Schedule

9:00 - 9:30: Warm up, team building

9:30 - 10:30: What are we starting?: The current situation of the agency (plenary presentation and discussion)

10:30 - 11:30: Overview of the project structure (plenary presentation and discussion)

Lunch

1:00 - 2:30: Goal setting and strategizing (group work): See Sample Planning Worksheet

2:30 - 3:00: Planning for next steps (plenary discussion)

Data Analysis and Planning Meeting Agenda (Sample)

Date

Location

Attendees

Team leads:

Agency staff:

Others:

Purposes

- Discuss assessment results
- Identify areas for intervention and decide on priorities
- Establish intervention goals and objectives
- Prepare a tentative plan for developing a wellness initiative

Schedule

9:00 - 9:30: Update on program activities

9:30 - 10:00: Discuss the Wellness Capacity Maturity model. The purpose of this segment will be to create a shared understanding of the levels of wellness capacity within which human service agency leaders can identify strengths and needs.

10:00 - Noon: Present and discuss assessment results.

Identify areas for intervention and set priorities among the issues identified.

Establish wellness goals and objectives.

Noon - 1:00: Lunch

1:00 - 2:30: Identify action items that correspond to wellness goals and needs. Use Sample Activity Planning worksheet.

2:30 - 3:00: Schedule for next steps: writing up an action plan for the program and additional activities as needed.

Implementation Plan Review Meeting Agenda (Sample)

Date

Location

Attendees

Team leads:

Agency staff:

Others:

Purposes

Review and finalize the implementation plan

Schedule

Progress Report Review Meeting Agenda (Sample)

Date

Location

Attendees

Team leads:

Agency staff:

Others:

Purposes

Review the implementation of the plan

Plan for project evaluation

Schedule

9:00 - 12:00: Project review

Evaluation basics

Progress report: What worked? What did not work? What could be improved?

Noon - 1:00: Lunch

1:00 - 3:00: Planning for evaluation activities

Scheduling and planning wrap-up

Planning Worksheet (Sample)

Step 1: Setting the purpose

Briefly describe the purpose or outcome that you would like to achieve with your wellness program? What outcomes would it have in terms of your employees?

Step 2: Identifying stakeholders

Identify the stakeholders in your wellness initiative. Here is a starter list:

Stakeholder	Name	Position Title
Union / worker representatives		
Management		
Health and safety professional(s)		
Human resources professional(s)		
EAP provider		
Medical or occupational health staff		
Other:		
Other:		
Other:		

Notes:

Step 3: Acknowledge Current or Informal Activities

Which of the following data sources are available to your team?

Data Source	Available? Y/N	Important? Y/N
Attendance records		
Accident / Injury / Incident / First aid reports		
Health care claims or health screening results		
Facility inspection records		
Survey / Questionnaire results		
Other		

Notes:

Step 3: (continued)

Here are some suggestions for what to measure. Which are important for your project?

Factors	Important? Y/N	Notes: (Who will gather these?)
Absenteeism		
Employee turnover		
Accident rates		
Implementation of employee suggestions or ideas		
Participation in programs		
Adherence to programs		
Awareness of healthy lifestyle issues		
Changes towards more healthy habits		
Satisfaction in working conditions – can cover many areas such as:		
Occupational health and safety		
Leadership style		
Communication across the organization		
Control over work		
Recognition for achievements		
Return to work rate from injuries or illnesses		

Notes: What strategies would work for measuring these factors?

Step 3: Collect Baseline Data

One way to assess employee needs is to administer the Healthy Workplaces survey. You are provided with a paper copy of the survey. Based on your knowledge of the employees at your agency, go over it and modify it to suit your needs. Provide a single copy that we can use to create an electronic or print version.

Employee Survey (Sample)

Please answer the following questions about your current workplace. Your answers are entirely anonymous and individual responses will be kept confidential.

A. Questions related to overall health outcomes

1. How healthy do you feel in your workplace?

Extremely healthy (5)	(4)	(3)	(2)	Extremely unhealthy (1)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. How do you feel about your job as a whole?

Extremely satisfied (1)	(2)	(3)	(4)	Extremely dissatisfied (5)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. What is our average daily level of unhealthy stress?

Very little or no unhealthy stress (1)	(2)	(3)	(4)	A great deal of unhealthy stress (5)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

B. Questions related to five wellness components of workplace

Please select one answer choice for each statement.

	Always/ Almost always (4)	Some of the time (3)	Rarely (2)	Never (1)
1. There are sufficient staff to handle the needs of clients	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I am clear about what I am expected to do in my job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I am involved in decisions affecting my job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I am well aware of stress hazards in my workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I have time to complete my tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. I have social and emotional skills needed to do my job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. My organization provides opportunities and support for self-care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. I feel that my life demands are reasonably balanced with my work demands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. I feel supported in my workplace when I am dealing with personal or family issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. I am encouraged to take mini breaks during the day to	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

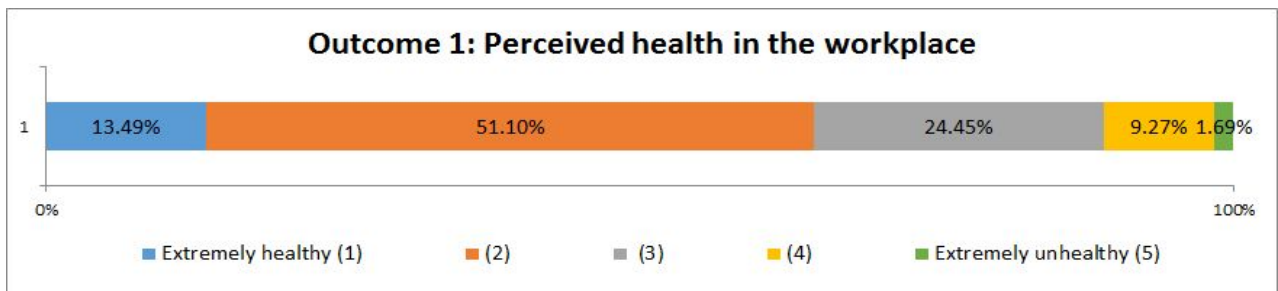
reduce stress at work				
11. I feel that my agency cares about my well-being	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. My workplace promotes healthy behaviours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. I get along well with the people I work with	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Supervision is reflective and relevant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. I am rewarded and recognized for my contributions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. I get help and support I need from my colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. I am free from put-downs, backstabbing, racism, and gossip in my workplace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Communication at my workplace is clear and effective	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. I have access to necessary equipment and resources to do my job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. The employee assistance program provides accessible and useful resources when I need them	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. The Health and Safety Committee addresses employee's workplace health and wellness concerns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. I have adequate protection from physical threats or attacks at work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. I have the training I need to do the work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. I have the training I need to stay safe and healthy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. I believe that my workplace encourages discussion of tough wellness issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. I experience openness/support for discussions of personal wellness issues (depression, anorexia, mental health, domestic violence, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. I share my problems and how I overcame these problems with colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. There are opportunities for employees to share tips and strategies for managing stress and stay healthy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. Best practices in wellness are recognized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. I can talk to my supervisor and co-workers when I am having personal or work problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Were there any other health and wellness issues in your workplace that you feel were not addressed in this survey?

Employee Survey Data Analysis Guides

A. Questions about health outcomes

Calculate the percentage of employee responses falling into each of the five levels of each health outcome. Display the % results in a bar graph. For example:



B. Questions related to five wellness pillars

- Calculate the total score for each pillar of employee response as follows:

Pillar 1: Question 1 to 6 (total score: 6 to 24)

Pillar 2: Question 7 to 12 (total score: 6 to 24)

Pillar 3: Question 13 to 18 (total score: 6 to 24)

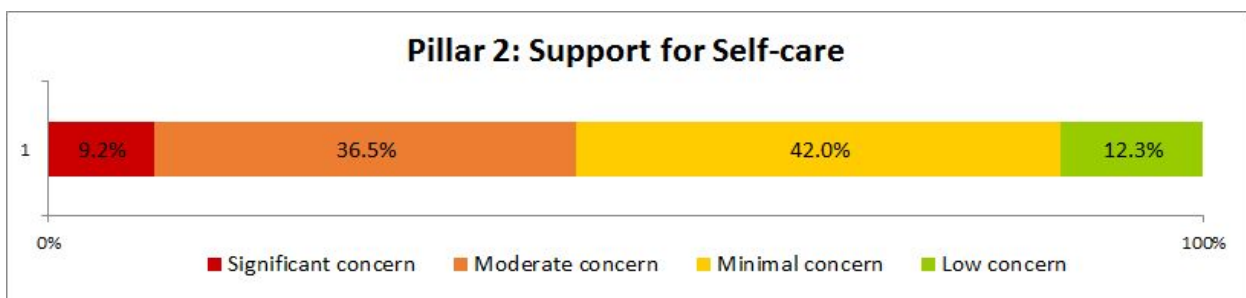
Pillar 4: question 19 to 24 (total score: 6 to 24)

Pillar 5: question 25 to 30 (total score: 6 to 24)

- For each pillar, determine the area of concern:

- Significant concern: 6 to 11
- Moderate concern: 12 to 16
- Minimal concern: 17 to 20
- Low concern: 21 to 24

- Calculate the percentage of employee scores falling into each of the four areas of concern for each wellness pillar. Display the results in bar graph. For example:



- Calculate the mean of responses for each pillar. Based on the result, determine the area of concern for the organization.

For example, if the mean response of a pillar is 14.6, that pillar should be of moderate concern for the agency.

Organizational Review (Sample)

Analyze the current state of your agency by using the Wellness Maturity Model. The review can be done at the organizational level and at the individual level. The key characteristics of each level determine whether you achieve that level of wellness maturity. It is likely that you will find your agency at one level but some of the practices seem to be moving to the next level while some other practices still remain at the previous level. This needs to be kept in mind when you make a strategic plan: the weak areas must be improved to fully complete the level before moving to the next level, so that your organization progresses evenly.

Level 1: Defined

- Jobs are clearly defined
- Employees are aware of stress hazards
- Wellness goals and standards are defined for individuals
- The Helping Professional Value Cycle is defined
- The primary emphasis in the agency is on client service

Level 2: Written

- Commitment in wellness in writing
- Wellness goals and standards are defined for agency
- Agency is committed to a consistent wellness process
- Wellness becomes a part of the mission of the H&S Committee

Level 3: Reviewed

- Wellness policy is reviewed regularly
- Wellness goals are reviewed regularly
- Wellness policy review is conducted by the H&S/Wellness Committee

Level 4: Trained

- Employees and managers are trained in the agency wellness process
- Employees are hired and evaluated based on their ability to contribute to the overall wellness of the organization
- Employees are trained in wellness policy administration

Level 5: Evolving

- Wellness becomes a strategic goal for the agency
- Wellness outcomes are continuously evaluated and improved
- The agency is known for its employee-centered wellness programs and policies and assumes the role of industry leadership
- The primary emphasis in the agency is on employee value
- Wellness policy outcomes contribute to the knowledge capital of the agency

Agency Assessment Overview Report (Sample)

(Use information collected from the organizational review, employee survey and other inquiries)

Agency:

Name:

Date:

A. General information about the agency and employees

B. Organizational review results

Describe the characteristics of the agency according to the wellness maturity model.

Agency's wellness maturity level (1 to 5): _____

C. Employee Survey Results

responses: _____

Main health outcomes

1. Overall workplace health

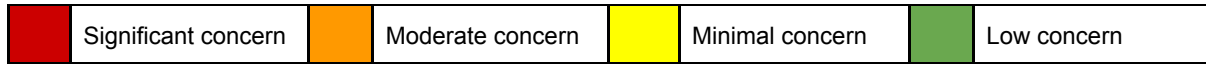
2. Job satisfaction

3. Daily levels of unhealthy stress

Five workplace wellness components (pillars):

1. Pillar 1: Know your challenges

Mean response: _____



Other issues:

2. Pillar 2: Support for self-care

Mean response: _____



Other issues:

3. Pillar 3: Build healthy work relationships

Mean response: _____



Other issues:

4. Pillar 4: Improve resources efficiency

Mean response: _____



Other issues:

5. Pillar 5: Communicate wellness ideas

Mean response: _____



Other issues:

Program Planning Worksheet (Sample)

Use information from the Agency Assessment Overview to formulate the results and discussion into an action plan.

Summary of the Agency Assessment Results

What are the most important issues?

Goals of the Project

Identifying Actions and Strategies

Goals/Activities	Pillar 1 Know your challenges	Pillar 2 Support for self-care	Pillar 3 Build a strong team	Pillar 4 Improve resources efficiency	Pillar 5 Communicate wellness ideas
Goal 1:					
• Activity 1					
• Activity 2					
Goal 2:					
• Activity 1					
• Activity 2					
Goal 3:					
• Activity 1					
• Activity 2					

Initiative Implementation Plan (Sample)

Initiative Title:

Goals

Expected Outcomes

Components of the Initiative

What are the features of the initiative? Show how each of the features of the initiative ties in with one or more of the outcomes.

Timeline

What are the suggested stages, how long will they last, and when will they occur?

Personnel

Who will carry out the initiative?

Evaluation

How will the initiative be evaluated?

Examples of Healthy Workplace Initiatives

1. Pillar 1: Know your challenges

- Incorporate wellness issues into training for staff and staff meetings.
- Publish a workplace wellness newsletter.
- Discuss mental health issues in the workplace
- Conduct a workplace wellness assessment to identify risk factors that affect employees' health and safety.
- Conduct a stress management workshop.
- Bring a guest speaker to talk about stress and wellness.
- Clarify job expectations.
- Redesign and reallocate work.
- Provide the Be a Wellness Leader training.

2. Pillar 2: Support for self-care

- Start a running, biking, gym club.
- Provide workplace yoga classes.
- Provide time for stress relief break/ team coffee time.
- Set aside time for mindfulness training.
- Start a fitness challenges program for employees.
- Provide information about healthy lifestyles at lunch time or on agency's website/newsletter/board.
- Subsidize memberships for employees at health and fitness centers.
- Provide fitness facilities.
- Create a poster with tips for positive thinking.
- Encourage employees to take mini-breaks throughout the day.
- Train employees on stress management techniques.
- Allow flexibility to deal with work-life conflict situations.
- Provide information about alcohol, drugs and smoking.

3. Pillar 3: Build a strong team

- Schedule time and organize team building activities.
- Provide opportunities for employees to meet and walk with others during lunch
- Have a 24/48 hour rule for conflict resolution
- Provide orientation for new staff
- Implement a mentorship program
- Organize team meetings so that other departments/teams can come and share ideas
- Regularly ask for inputs from staff to build a better team
- Role play real scenarios to resolve work conflicts
- Recognize and reward

4. Pillar 4: Improve resource efficiency

- Encourage the use of Employee Assistance Program (EAP)
- Ensure that the Health and Safety Committee addresses all wellness concerns

- Create a wellness newsletter and handbook with information on how to use available resources to keep healthy.
- Develop a policy that promotes the well-being of employees
- Develop a toolkit of resources
- Make a list of online wellness resources
- Post on billboard and online information about agency's benefits and resources available to employees
- Create flexible working hours and work arrangements.

5. Pillar 5: Communicate wellness ideas

- Incorporate wellness issues into training for staff and staff meetings
- Provide opportunities for employees to share tips and strategies for managing and coping with stress
- Share success stories and provide recognition within team
- Research and incorporate best practices
- Provide time for telling and role-playing wellness stories in staff meetings, and publish those stories in agency's board or newsletter.
- Put up a wellness wall where employees can post healthy eating tips, exercise routines, etc.

To download the infographic with wellness initiative ideas, visit http://hwHP.ca/uploads/3/4/9/1/34914254/initiatives_infographic.pdf

Examples of Ways to Reduce Stress in Human-Services Work

1. Pillar 1: Know your challenges

- Take the Be a Wellness Leader workshop
- Talk to experts
- Discuss stress with your coworkers and friends
- Track your stressors – keep a journal
- Develop healthy responses

2. Pillar 2: Support for self-care

- Eat well
- Get enough rest
- Exercise regularly
- Be mindful
- Spend time with friends and family
- Avoid “escapist behaviors”
- Take time to recharge
- Prioritize and organize your tasks
- Leave work at work

3. Pillar 3: Build a strong team

- Be transparent
- Clear communication
- Ask for feedback
- Job shadowing
- Empower and recognize
- Participate in team building activities
- Follow through with goals
- Turn to co-workers for support
- Talk to your supervisor on how to best perform the job

4. Pillar 4: Improve resource efficiency

- Promote/encourage EAP use
- Get access to online information
- Learn about available counseling and referral to mental health professionals
- Incorporate best practices
- Advocate for updated policies

5. Pillar 5: Communicate wellness ideas

- If you see a colleague who is having a bad day, stop and say, “I’ve been there.”
- Show support and share resources
- Do not try to solve the problem for others
- Share your stories in informal and formal occasions

To download the infographic with wellness ideas for employees, visit http://hwhp.ca/uploads/3/4/9/1/34914254/infographic_3.pdf

Other resources

The Canadian Centre for Occupational Health and Safety:

Workplace health and wellness program - getting started

https://www.ccohs.ca/oshanswers/psychosocial/wellness_program.html

Sample of workplace health and wellbeing survey

https://www.ccohs.ca/oshanswers/psychosocial/sample_wellness.html

Sample of workplace health program elements

https://www.ccohs.ca/oshanswers/psychosocial/sample_elements.html

Guarding Minds @ Work: A Workplace Guide to Psychological Health and Safety:

The 13 psychological factors

https://www.guardingmindsatwork.ca/info/risk_factors

GM@W Resources

https://www.guardingmindsatwork.ca/info/gmaw_resources

Workplace Wellness Online Canada

Best practices and success stories

http://www.who.int/occupational_health/healthy_workplace_framework.pdf

Wellness toolkit

<http://workplacewellnessonline.ca/pdfs/workplace-wellness-toolkit.pdf>

World Health Organization

WHO Healthy Workplace Framework and Model

http://www.who.int/occupational_health/healthy_workplace_framework.pdf

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