

Organisational Health and Wellness Plan – Instructions

Part A: Full organisational health & wellness plan

Use the questions contained within to assist you in creating your organisational health & wellness plan. The questions have been designed to help you really understand what having health and wellness in your organisation means. It is not an exhaustive list; rather, it's a means to get you thinking and to steer you in the right direction.

This is your plan, and your unique needs must be captured throughout the process. If there's something else that you need to include so that the unique needs of your workforce and workplace are captured then go ahead and include it.

There are no right or wrong answers here. Health and wellness means something different to everyone so it's important to understand the stressors that your workforce are facing and then create a plan that addresses those areas specifically.

Section 1: Research

What is the current health and wellbeing of your organisation?

- What is your absenteeism rate like?
- What level of productivity are you experiencing?
- How many employee complaints are you receiving?
- What is your level of employee turnover?
- What is the energy level of your workforce?
- What is presenteeism currently costing you?
- Do your employees come to work when they are sick?
- When your employees are unwell, do they try to work from home?
- Does your organisation have a 'working from home' arrangement?
- Do you know the current thinking of your workforce around how stressed they are at work?
- Do you actively measure the satisfaction of your workforce with their roles and engagement with the organisation?

What health & wellness activities are you currently doing?

- Do you currently undertake any health & wellness activities?
- Have you measured their effectiveness?
- Have you asked your workforce to provide you with feedback on these activities?
- Do they meet the needs of your employees?

Are they effective, efficient and/or working for you?

- How do you know whether or not they are working?
- Are they appreciated by your employees?
- Do your employees get anything out of them?

What stressors currently impact your workforce?

- Where is the stress coming from?
- Do you know what is impacting your employees the most?
- Are the stressors within your control?
- Is there a common list of top ten stressors?

How do you know that these are the stressors, and that they are all of the stressors that your workforce is facing?

- What research have you previously done to identify where the stress is coming from?
- How do you know that you know about all of the stressors?

What strain do these stressors place on your organisation's ability to achieve its strategic goals?

- How are the organisation's goals impacted by the stress that is being experienced by the workforce?
- Do you know the health & wellbeing level of each employee?
- What is the risk to the organisation of health-related events happening on-site?
- Do you have appropriately trained individuals within the workforce to assist in the case of any on-site incidents?
- How is the human resource element of your organisation impacted by absenteeism and/or presenteeism?
- How quickly does sickness and illness spread within your organisation?
- How are the financial goals of the organisation impacted by absenteeism and/or presenteeism?

What research do you need to do for you to be confident that you understand the stressors your workforce is coping with? What help do they need and how do they want to receive that help from your organisation?

- Do you need to access industry research?
- Do you need to survey your employees?
- Do your leaders need to survey their team members?
- Is anecdotal information enough, or do you need to undertake anonymous survey-style research?
- What questions do you need to ask?
- What type of information do you need to know?
- Can you handle the research internally, or do you need to engage an external organisation to undertake the research for you?

How long do you think undertaking this research will take?

- What timeframe can you afford?
- How long will you allow for information to be collected and collated?
- How long will you allow for information to be analysed and presented?

How will you conduct this research?

- Will you conduct face-to-face research?
- Will you conduct survey-style research?
- Will you use an external, independent researcher?

- Will you conduct the research internally?
- Will you use electronic means of collation?
- How long will you give people to respond?
- What happens if no-one responds?
- How will you make sure all employees participate in the research?

What metrics will you use to analyse this research?

- What is it important that you measure?
- How will you do this?
- How will you determine how you will measure against this?
- How often will you measure?
- What reporting mechanism will you have?
- What will you report on?

Section 2: Plan

What is your organisation's definition of 'health & wellness'?

- How do you define 'health & wellness' in relation to your organisation?
- What does health & wellness mean to your organisation?
- Will you use a standard definition from a well-known dictionary?
- Will you create your own definition that is uniquely aligned with your organisation?

What is your organisation's strategic aim in implementing a health & wellness plan?

- Why do you care whether your organisation has a health & wellness plan?
- What do you want to achieve from having a health & wellness plan in place?

Define your organisation's values in relation to health & wellbeing.

- What are your organisation's health & wellness values?
- What's important to you about health & wellness within your organisation?

1. Start by asking yourself these questions:

- ❖ *'What is important about the health & wellbeing of the people within our organisation?'*
- ❖ *'What do we truly value about the health & wellbeing of our organisation?'*

Keep asking these questions until you have 5 values listed. Limit your value to one word and then let the description explain what the value means to you.

2. Use the 'Description' column to add some additional words or a description to describe each value, as some may be similar.
3. After all of the 5 values have been written down, compare the values by asking *'Is 1 more important than 2?'*, *'Is 2 more important than 3?'* and so on until you end up with a hierarchy of values with the most important one at the top.

What is the overarching strategic outcome that you hope to attain through implementing a health & wellness plan?

- What is the specific outcome (or goal) that you want to achieve by having a health & wellness plan in place?

If you were to put this overarching outcome into one sentence, what would that be?

- How can you explain this overarching outcome in one sentence that everyone can easily understand?

List five (5) key outcomes (or goals) you want to achieve by putting a health & wellness plan in place, and up to five (5) points for why each outcome is important.

- What are the five (5) key outcomes that will enable you to achieve that one overarching outcome?

What capabilities do you already have within your workforce that will help you in achieving these outcomes?

- What skills do you already have within your organisation?
- Are there people who are deeply committed to health & wellness that can apply their wisdom and knowledge to help the organisation achieve its goals?
- Do you know who these people are?
- How can you engage them to be health & wellness 'Champions' for your organisation?

What capabilities will you need to grow, develop or in-source to help you achieve these outcomes?

- What capabilities don't you currently have?
- How can you source these capabilities?
 - Do you need to provide training?
 - How long will this take?
 - Do you need to in-source these capabilities as a gap measure?

Section 3: Engage

How, when and by whom will your program be introduced and implemented?

- What will you do to engage your workforce and get their 'buy-in' to your health & wellness program?
- At what point in the process will you start to engage your workforce?
- Will you include your workforce in the planning stage?
- Will your workforce have representatives included in all stages of the process? If no – at what stage will they be represented?
- How will your workforce be represented in the planning stages?

Who will be your health & wellness 'Champions'?

- Where will you place your health & wellness 'Champions'?
- Who is/are the best person/people to be your 'Champions'?
- Will your 'Champions' be at the very top of the organisation?

How will the individuals at the top of the organisation role model the importance of health & wellness?

- How visible will your 'Champions' be?
- What involvement will your 'Champions' have in the health & wellness program that your organisation implements?
- How hands-on do you need your 'Champions' to be?
- What will they do to actively encourage health & wellness in your organisation?
- What will they do regularly to engage the workforce in the health & wellness campaign?

Will you have a health & wellness committee?

- Do you need a health & wellness committee to assist the organisation in achieving its outcomes?
- Who will be responsible for driving the action plan if there isn't a health & wellness committee?

If yes – how many committee members will you have, and how will you fill the committee roles?

- If you are going to have a health & wellness committee, how large should it be?
- How many positions will the committee be made up of?
- How will the committee positions be filled?
- How will you ensure that all divisions of the organisation are represented on the committee?
- How will the committee members make sure they are representing the needs of the workforce?

What charter will you give the committee, and how will they report to you and be monitored?

- What role will the health & wellness committee fulfil?
- Will they be responsible for creating an action plan that achieves the outcomes of the health & wellness plan?
- What reporting mechanism will be in place to ensure:
 - Budgets?
 - Activity approval?
 - Regular reporting?
 - Ongoing activity?
 - Relevance of activities?
 - Measurement against stated outcomes?
- How will you monitor the activity and effectiveness of the committee?

How will you encourage ongoing feedback from all levels of your organisation?

- How will you ensure that you are receiving timely feedback from your organisation the effectiveness to the workforce of your health & wellness program?
- What research will you conduct regularly to ensure that the program meets the ongoing needs of the workforce?

How will you communicate your program to your workforce?

- What part of the health & wellness program will you communicate to your workforce?
- How will this communication occur?
- How often will this communication occur?
- How will your workforce communicate with you about the health & wellness program?

How often will you communicate your program to your workforce?

- How often will you communicate your health & wellness program with your workforce?

Will you make health & wellness a measurable part of the key outcomes within the roles of your leadership team?

- Will your leadership team be engaged in the process of embedding the health & wellness plan into the workplace?
- Will their participation in, and encouragement to others to participate in, the health & wellness program be a part of their KPI's?
- How will this be measured?
- What happens if they don't participate and/or encourage others to participate?

Who will ultimately be responsible for the successful implementation and engagement of your health & wellness plan?

- At what level within the organisation will the ultimate responsibility for the successful implementation and engagement of the health & wellness plan lie:
 - Board level?
 - Executive level?
 - Senior management level?
 - Lower levels?
 - Everyone will be held accountable?
- What happens if the health & wellness program isn't accepted and there is no engagement within the organisation?

Section 4: Implement

What are the five (5) main aims that you want your engagement strategy to achieve?

- What are the main aims of having a health & wellness program in place?
- What's most important to you?
- What happens if you don't achieve these things?
- What are you prepared to do to make sure you achieve these aims?

What are the five (5) action steps required to achieve each of these aims?

- What action steps do you need to take to achieve each of your aims?
- How will you get to where you are going?
- What steps are needed?
- Who needs to take them and who needs to get involved?

If you were successful in implementing your health & wellness plan throughout your organisation, what would that success look like?

- What does success look like?
- How will you know that you have achieved your outcomes?
- What outcomes can you document in a specific format that can be easily measured?
- What five (5) things will you have or be able to see if you succeed at implementing your health & wellness plan?

What human resources budget will you allocate to the creation, implementation and review of your health & wellness plan?

- How will you support your workforce in creating, implementing and measuring your health & wellness plan?
- Will you include health & wellness hours in:
 - Certain roles?
 - If so, which ones?
 - All roles?
- How many hours will you allocate?
 - Will this be the same for everyone, or vary?
 - How will you determine the allocation?

What financial budget will you allocate to the creation, implementation and review of your health & wellness plan?

- What financial budget will you allocate to your health & wellness program:
 - Per person?
 - Overall budget?
 - Weekly?
 - Monthly?
 - Quarterly?
 - Annually?
- How will you monitor the effectiveness of the spend?
- How will you measure the effectiveness of the spend?

Section 5: Review

- How will you determine the success or failure of the stated outcomes of your health & wellness plan?
- What measurement will you put in place around the success factors listed in Section 4?
- What implementation phase or phases will you allow?
- What engagement phase or phases will you allow?
- When will you start measuring the success of your health & wellness program?

How will you measure the outcomes of your health & wellness plan?

- What metrics will you put in place to determine the success or failure of your health & wellness plan?
 - How will you measure?
 - What will you measure?
 - When will you measure?
 - What steps will you put in place to shape and mould the health & wellness plan as you implement?
 - How will you build flexibility into the health & wellness plan so it can change with the needs of the workforce?

How often will you measure the outcomes of your health & wellness plan?

- When will you measure:
 - Creation of action plan?
 - Implementation progress?
 - Engagement and participation?
 - Effectiveness?
- How often will you measure these things?
- When will you determine the progress and whether this meets expectations?

How will you report these measures to the organisation's board?

- What information will the board need?
- How often will they receive an update?
- What input is required from the board?
- What involvement and oversight will the board have?

How will you use the measurements to continuously shape and mould the contents of your health & wellness program?

- How will the information received from the measurement process assist your organisation in continuously shaping the health & wellness program so that it meets the ongoing and changing needs of the workforce?

What happens if your health & wellness program doesn't work?

- What is the impact to the organisation if the health & wellness program doesn't work?
- How will the organisation continue to meet its goals?

Part B: Short-Form Strategic Action

1. Your Health & Wellness Plan

- This diagram has already been set for you so you can see the structure that your plan will follow.
- The information in this diagram reflects the five (5) main categories that the plan you have created will distill down into.
- These five (5) categories will keep you focused on what needs to be done, by whom, within what timeframe and to a specific measurement.

2. Organisational Health & Wellness Plan – Short Form Strategic Action

- Look at your completed organisational health & wellness plan:
 - Distill the plan down into 5 key areas that encapsulate all the tasks required to create, build and implement your plan into your workplace.
 - Order these actions from 1 to 5, ; with 1 being the first action step required and 5 being the last action step in the process.
- Using the '*Organisational Health & Wellness Plan – Short Form Strategic Action*' template, in each of the 5 rectangular sections:
 - Enter the name and details of the action steps; and
 - Allocate a number of months that it will take you to complete the action.
- For each action step, allocate the months during which the action will be taken and place in the oval for each step:
 - For example, you might estimate that the first action point might take up to 3 months to complete, so you would enter 0-3 in the oval for the months taken to complete.
 - The second action point would then start at month 3 and so on.

3. Health & Wellness Plan on a Page

- From your completed organisational health & wellness plan, make the following changes to the '*Health & Wellness Plan on a Page*' template:
 - Take the definition you created for what health & wellness means to your organisation and place it in the '*Our definition of health & wellness*' box.
 - Take the aim that you created and place it in the '*Our aim*' box.
 - Look at the five (5) outcomes that you documented as part of the health & wellness planning exercise and place them into the corresponding boxes in the '*Plan on a Page*'.
 - Create one overarching outcome statement and place it in the '*Outcomes statement*' box.

- Insert the capabilities you already have for this outcome in the corresponding '*Capabilities We Have*' box.
- Insert the capabilities you need to acquire/develop for this outcome in the corresponding '*Capabilities We Need*' box.
- Take the values that you created in the planning process and place them into the '*Our health & wellness values*' box.

4. Health & Wellness Engagement Strategy

- From the information you captured and recorded during your organisation health & wellness planning session, make the following changes to the '*Health & Wellness Engagement Strategy*' template:
 - Take the five (5) main aims you created for your engagement strategy and place them next to the corresponding dot points in the '*Our aim*' section.
 - Take the five (5) main actions that you need to take to successfully engage your workforce and place each one next to a corresponding dot point in the '*Our actions*' section.
 - Also place each action point in a '*Key Action*' box and then place the specific steps needed to achieve the key action in the dot points below the box. Complete this step for each key action point.
 - Take the five (5) items you recorded as the success points and place them next to a corresponding tick (✓) in the '*Success means*' box.

Part C: Next Steps

Now that you have your comprehensive *'Organisational Health & Wellness Plan – Short Form Strategic Summary'*, *'Health & Wellness Plan on a Page'* and *'Health & Wellness Engagement Strategy'* documents completed, it's time to start taking action and putting it all into place.

Start with your research and then move step by step through the plan until you have it all working for you.

Remember to retain an element of flexibility, so that you can shape and mould the plan as you find out more information about your workforce, and start testing the effectiveness of the solutions you have in place.

Remember, engagement of your workforce is key and it starts by complete adoption and participation from the highest levels of the organisation.

Make it fun, make it inclusive and create a program that matches the needs and wants of the unique individuals that make your workplace hum.