



## LAYING THE FOUNDATION FOR WELLNESS

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Maintaining a workplace wellness initiative can be overwhelming, especially if you are expected to champion the initiative with a full plate of expectations at work. The Wellness Council of Indiana understands your struggle, which is why we designed AchieveWELL to guide you along the pathway and meet you where you are in laying the foundation for wellness. We are here to mentor you through the process.

You are likely trying to grasp what a comprehensive wellness initiative should look like and how it should contribute to your organization. As you consider the strategy behind your initiative, note that an effective wellness plan should reach your workforce in a variety of ways. Your plan should:

- Recognize and encourage employees who are already on the path to a healthier lifestyle.
- Support employees who are ready to make changes toward a healthier lifestyle by providing the tools they need to be successful.
- Acknowledge that some employees are not ready to make a change. Avoid focusing your time and energy educating this segment of the population, but consistently remind them that support is available when they are ready. Realize that impacting every single employee through wellness is likely unrealistic.
- Manage chronic disease among employees, spouses and dependents.
- Include spouses and dependents in wellness initiatives to cultivate a healthier home environment for your employees. Remember... a healthy spouse is a healthy house!

Successful wellness initiatives begin with the support of your leaders. When leaders

recognize that the overall health and well-being of employees is key success factor for the organization, wellness can be embraced as a strategic business practice – not just another employee benefit. It is essential to have a clear understanding of how wellness can make a positive impact on the organization and how it will be executed. The leadership team must value a healthy work culture, endorse the wellness plan, and expect all employees at all levels of the workplace to engage.

Before you can gain leadership support, there are few steps you need to take. Remember, the Wellness Council of Indiana is with you every step of the way – you are not alone.

## STEP 1: THE BASIC ASSESSMENT

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Before approaching your leaders, gather information about your current work environment and identify priority areas for improvements. To gain a better understanding of what issues are facing you and your wellness team, assess your current work environment. Walk around, observe, and take notes about what you see. Ask your employees questions to get their feedback. The following basic recommendations can help you gain a better grasp of what is happening in your organization.

### Physical Environment:

Look at your surroundings as if you were a first-time visitor. What do you see and what do you perceive from the environment? Refer below for a few suggestions. Is the workplace:

- Clean or Dirty?
- Bright or Gloomy?
- Invigorating or Draining?
- Updated or Outdated?
- Welcoming or Inhospitable?

### Observation of Employees:

Look at the employees and how they interact in your workplace. What do you observe about their:

- Expressions?
  - Cheerful or somber? Confident or worried? Excited or depressed?

- Stress levels?
  - Stressed or relaxed?
- Energy levels?
  - Upbeat, energetic and friendly or lethargic, unwilling, and pessimistic?
- Postures?
  - Sitting upright, slumped over desks, able to freely walk or stand?
- Conversations and interactions?
  - Quiet or stiff?
  - Casual conversation and occasional laughter?
  - Does it seem like they have fun?
  - What are employees talking about?

#### Observation of Workspace:

- Is the technology and office equipment updated or outdated?
- Do you see personal belongings displayed or is it a sterile environment?
- Is the workplace conducive for collaboration or are everyone's doors closed?
- Are there wall or bulletin board displays?

#### Physical Activity:

- Are the stairs accessible?
- Do employees sit at their desks all day or are there opportunities for physical activity?
- Do you notice employees moving throughout the day?
- Are employees able to walk throughout the workplace or around the campus?

#### Nutrition:

- Health value of foods served in meetings, staff events, etc.
- Presence of unhealthy vending machine-type of foods available
- Available healthy food options
- Presence of soda machines – what is in the machine?
- Availability of free water
- Facilities have storage and preparation stations for healthy foods

#### Tobacco:

- Are there tobacco policies? How extensive are they and do people comply?
- Where is the smokers/tobacco users designated area?
- Are non-tobacco users exposed by having to walk through this location?

## STEP 2: TAKE INVENTORY AND CREATE A VISION

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When laying the foundation for a wellness initiative, take time to step back and inventory what might already be happening in your organization. One of the fastest ways to grow the momentum for wellness is to build off existing programming, policies and the interests of staff in your organization.

Use the provided Wellness Inventory in the Appendix to gain a better understanding of what your organization might already be doing to advance wellness in your workplace. You can also find a copy of the Wellness Inventory on our website under the “Resources” tab. In many cases, you will check off items on the inventory and realize that there are already defined wellness programs that have organically sprouted in your organization. We will discuss later how to support these organic programs without disrupting their success and not spending a lot of valuable time and resources on them.

After taking time to assess your current environment, start drafting a workplace wellness vision. This can be done with a committee or on your own. Remember, this is the initial draft and it does not have to be perfect. Use the provided Vision Guide in the Appendix to help direct your initiative with outcomes. More assistance can be found on our “Members Only” page of our website.

## STEP 3: PREPARING TO APPROACH TOP MANAGEMENT

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You might have just a few minutes to discuss your workplace wellness initiative with top management. Are you prepared to communicate the most important points in a concise way? Do you understand how to best present your requests to them? Fail to plan – plan to fail!

Plan ahead for any materials you might distribute during the meeting. Remember to provide the information in a concise and straightforward way – know your decision makers and give them what they need to make a decision. Too much information means more expected analysis by you for them. Not enough information means ill prepared and

a likely “no” answer. Are you prepared to approach top management? The following points might be helpful in your planning.

- Have you gathered appropriate information to demonstrate the need for wellness in your workplace?
- Who makes the decisions in your workplace and are you prepared to navigate the decision-making process?
- Do you have a plan for how you will deliver the message to employees to get them interested in participating in a wellness initiative?
- Have you determined a strategy for how you will encourage middle management and direct supervisors to support wellness and participate in the initiative?
- Have you found the ‘executive champion’ who will be an advocate for wellness in your organization?
- Are you expecting any wellness adversaries at the top management level?
- Are you prepared for pushback from all levels of management and staffing?
- Have you considered your desired budget for wellness? Is it realistic, and are you prepared to ask for investment from top management?

#### Developing the strategy for approval:

Do not approach your leadership without a well thought out plan to receive approval for wellness. This is your opportunity to convince them that time and resources allocated for wellness will be worth it—so do your homework. Spend time gathering solid reasons for why it is imperative for your organization to invest in a wellness initiative. Think about how you will get employees interested in participating. Consider the preferred style of presentation for top management and be prepared. Here are some key points as you build your plan:

- Why do you need a wellness initiative in this organization?
- What are you doing to ensure the initiative reaches beyond health care costs?
- What metrics do you have to demonstrate the need for wellness in your workplace? (Be as specific as possible to your organization’s needs)
- How will you drive it forward?
- What is your communications plan for how you will get the workforce interested and excited about starting a wellness initiative? How will you develop credibility for wellness in your workplace?
- How will you keep all levels of management involved and engaged with the wellness initiative?
- What kinds of resources do you need?
- What support do you need from your top leadership?

- What is the most effective way to package and present this information to top management – especially if you do not have much time?

## STEP 4: PREPARE FOR INITIAL PUSHBACK

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If you are fortunate, your leaders will already value the health and well-being of their employees. This is not always the case, and it is a good idea to be prepared for some pushback. Here are some of the common oppositions to wellness. If you anticipate that your top executives might take some convincing, it is worth it to have some respectful rebuttals prepared to strengthen your case.

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*“This is not our job. It’s not important.”*

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“If you are in business, then you are in the business of health.” This statement comes from Phil Terry, CEO of Monarch Beverage. Mr. Terry realized that in order to have a thriving business, he must have healthy employees to drive the profits. A well-strategized wellness initiative is one of the most effective ways to take care of your organization’s most important asset, the employees.

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*“There is not enough space, time, or staff to do this.”*

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A wellness initiative does not have to take up a great deal of space, time or resources to be effective. Wellness is one-size-fits-one and can be designed to accommodate your organization’s needs and limitations. When it comes to staff, you can pull together your wellness champions into a committee, along with other interested staff members, to share the workload and work collectively as you drive the initiative forward.

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*“We have tried wellness, and it wasn’t successful.”*

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A successful wellness initiative is much more than a health screening, fruit on the table and a walking program. This is a good start, but to be truly successful with wellness, you must be strategic in your approach. By following the ten steps of the AchieveWELL process, you will have a blueprint to reach the level of success your top management is

seeking. Furthermore, the Wellness Council of Indiana has a template for you to use to build your operating plan, found on our “Members Only” website page.

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*“We spend too much money on healthcare costs. I can't put more money into wellness.”*

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Wellness is not healthcare! Besides, it does not have to cost a great deal of money and it is possible to be successful with limited resources. Look into any opportunities for reallocating budget items for wellness, which could help avoid coming up with a new budgetary item for wellness. Also consider the ancillary benefits to a wellness program, which might justify the investment, such as:

- Reduced rates of absenteeism
- Higher rates of productivity
- Reduced turnover
- Increased employee morale
- Fewer accidents and injuries
- Improved company image

Greater opportunity for recruitment and retention of the best and brightest employees  
After a few years of a successful wellness initiative, your organization may not have to spend so much money on healthcare costs – but this cannot be guaranteed and it will take time and dedication. AchieveWELL provides your organization a blueprint that gives a fighting chance of reducing health costs in the long run.

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*“I don't see wellness making sense for our employee population.”*

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Employees deserve to work in an environment that provides the opportunity to live an optimal quality of life. In this changing business climate, wellness is not just a nice thing to do for employees. It is a strategic business practice. Besides, evidence from many reputable sources will show that investment in a wellness program that is planned and executed properly will net positive impact on profits.

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*“If we're not providing insurance, we do not need wellness.”*

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If you are not providing health insurance, this is all the more a reason to provide a

wellness initiative. Without health insurance as a benefit of employment, a solid wellness initiative is a way to recruit and retain great employees. Research proves that organizations with a thriving culture have a competitive advantage over other organizations – wellness at work is a cultural change agent.

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*"I'm concerned about employee confidentiality."*

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This is certainly a valid concern, and it is possible to promote a health-supporting work environment without requiring personal information from employees. Confidentiality issues can be avoided if you focus on changing the work environment and providing volunteer-based group activities.

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*"I don't want to disrupt productivity by distracting people with wellness."*

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Research has shown that productivity is increased in the workplace by offering a comprehensive wellness initiative. Start by examining the work environment and company culture of your organization. Determine which activities would be least disruptive to the work environment and work toward those efforts first. Easing into a wellness would be a good approach—just make sure you are consistent in your messaging and that you keep driving forward.

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*"I won't support taking people off their jobs to participate. We need to keep our eye on our jobs and there is no time."*

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It is understandable that some businesses do not provide an opportunity during working hours for wellness participation. If this is the case, consider offering a time for participation during break or lunch times. If there is enough interest, programming before or after work might be a possibility, although it is challenging to get employees to participate during these times. Be sure to examine if this is a real barrier to wellness, or if this is a cultural challenge of your organization that you might be able to work through.

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*"What's the ROI (Return on Investment)? If we're not seeing a return, I'm not putting money into it."*

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Wellness initiatives will not transform a workplace overnight. It might take 3-5 years to

see notable changes, depending on your culture. If top management is demanding a quick return of investment for wellness, you have a challenge on your hands. If they are willing to hear you out, help them to view wellness beyond the ROI and at the impact of productivity. Well-being is made up of physical, social, professional, financial and community health and workplaces have an important opportunity to help make a positive impact. Hopefully you have the opportunity to share this vision with top management.

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*"I don't want to discriminate or punish anyone by using incentives."*

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Incentives should be motivating and rewarding, not discriminating and punishing. If you are just starting out with a wellness initiative, consider what incentives would garner the interest of your employees most. They should be encouraged in a positive way and not used negatively for non-participants. Keep in mind that the goal of your wellness initiative is to help people want to feel better. Incentives can be small, such as T-shirts, and gift cards. Get creative and consider what your employees would be most excited about—then use these incentives in a positive, rewarding way. Make certain your incentives match what you want your outcomes to be.

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*"We have high turnover, I question making this investment if our employees are going to leave."*

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Research shows that wellness initiatives that improve culture lead to better retention rates. Use this opportunity to talk about how wellness is a strategy to improve the turnover rates by making the work environment a more desirable place to be employed.

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*"How will we see cost savings?"*

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Your cost savings might not come from reduced health insurance costs initially. However, there are ways to demonstrate a cost savings from the following ancillary benefits of a successful wellness initiative:

- Reduced rates of absenteeism
- Higher rates of productivity
- Reduced turnover
- Increased employee morale
- Fewer accidents and injuries
- Improved company image

Greater opportunity for recruitment and retention of the best and brightest employees  
While we are on the topic of pushback, keep in mind that it does not always come from the top. In many cases, your senior leadership will be in favor of wellness, but it is the direct supervisors and managers that prevent employees from participating.

Here are some common objections from middle management:

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*"We have too much to do! I cannot let employees leave their job."*

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Research proves that wellness at the workplace improves productivity, so supporting the participation of employees can lead to better outcomes. Expect the supervisor to get engaged, as an example to their team. Departmental challenges are an effective way to inspire teamwork and collaboration between coworkers. Friendly competition is a fun way to get more people involved with wellness.

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*"I don't understand the value of this, so I don't see it as a valuable way for my employees to use their working time."*

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This emphasizes the importance of properly informing and educating supervisors why wellness is important and how better performance can occur. Front line supervisors, managers and directors feel out of the loop and uninformed. It demotivates them from encouraging others to participate. Make sure to include them in trainings and informational sessions, and also inform them of where they can receive additional information about the wellness initiative, should they need it.

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*"We don't have enough staff coverage to take time out for wellness."*

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Help them understand that this is a directive from the executives, and they expect employees to be engaged and excited about participating. You need their help to encourage their employees. We must reinforce throughout the chain of command that management is fully supportive and cares for the well-being of staff. Open up dialogue to discuss how barriers might be overcome in working with middle management to make wellness programming accessible for employees whenever possible. If this persists, have executive-level wellness champions to speak to the managers who are resisting.

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*"It's not my responsibility to meddle in the personal lives of my employees."*

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A wellness initiative is not about meddling. A wellness initiative is about creating a work environment that supports people in their quest for health, productivity, happiness and their best quality of life. The company is paying a salary and benefit to have employees do the jobs to the best of their ability. Consider this concept to be a maintenance program for your "human machines."

### Pushback from Employees:

Be prepared for pushback from some of your employees. They may not see the value of wellness in the workplace. Do not be discouraged by the vocal opposition and accept that not everyone is willing to be reached. Here are some common pushback comments you might experience from employees. It is likely that not all will apply to your initiative, but consider them when developing the strategy for wellness in your organization.

- "I am not comfortable exercising with my coworkers."
- "I don't feel like my employer is doing this for the right reasons. I don't trust them and I think they are trying to gather my personal information."
- "It's not my employer's business what I do outside of work."
- "I'm too overwhelmed at work to participate—I don't have time."
- "I feel too stressed out to focus on anything but work."
- "I don't have the time or money to eat healthy and exercise."
- "I think this is just a waste of time. This doesn't interest me."
- "We are here to work—not goof off and call it wellness."
- "I would like to participate, but I can't get away from the job."
- "They say we have a wellness program here, but I don't really feel like they want us to take time away to participate."
- "I don't agree with punishment, like increasing our health premiums, if we don't do certain things. It's my own business."
- "I don't even really know what's going on with wellness. It's not really communicated, and I don't take the time to seek the information out."
- "It seems like just one person pushes out their own interests. I might consider participating if the program actually interested me."
- "I know I have a lot of work to do when it comes to wellness and I get discouraged. I don't want to be embarrassed in front of my coworkers."
- "My employer tells me I should eat healthier, but all we have here at work are

vending machines. How am I supposed to make changes if they don't make it easier to get healthy?"

- "I'm not on the insurance plan— therefore I don't receive any of the benefits for participating in the wellness activities."
- "The CEO seems like he/she is all about wellness, but my manager doesn't agree. I don't feel like I'm allowed to participate, as he is the one I report to."
- "The only people on that wellness committee are marathoners and iron man athletes—obviously wellness doesn't apply to someone like me."
- "I work on the manufacturing floor and I am moving on my feet all day. I don't need to participate in a wellness program."
- "Even if my workplace is healthier, my family is not. I don't know how I can get them more interested in wellness."
- "How can we promote a healthier workplace when every single one of us is so stressed out because of our jobs?"
- "Couch to 5K? How about couch to stand-up? That's about where I am. I doubt I'd be able to keep up with everyone else."
- "Exercise and healthy eating are not my priority right now. I'm just trying to pay all my bills. Maybe when I dig myself out of debt I will consider wellness."
- "My employer wants us to quit smoking? Maybe they should start by not allowing it here at work. Those people might be 8 feet away from the door, but we all still see them."
- "I'm here at work all day long. The last thing I want to do is come in early or stay later than I have to for some wellness program."
- "I would like to participate in the wellness program, but everything happens at the company headquarters and I work too far away to join in the activities."

## STEP 5: SHARING THE VISION

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One of the most powerful ways to advance your wellness initiative is to get all levels of management behind your efforts to improve the well-being of your employees. This starts with communication. If middle management and direct supervisors understand the 'why' behind wellness, they are more apt to encourage their employees to participate. Better yet, ask for their feedback, allow them to express their concerns and work together to develop a plan for employee participation that they are comfortable supporting. Many times, middle management does not encourage their direct reports participating in wellness because they do not know much about it themselves.

How do you typically communicate with differing levels of management in your organization? Consider using this mode of communication to inform management that you need their support in rolling the wellness initiative out to employees—before you inform all of the associates. Here are a few things to consider when sharing the vision for wellness with all levels of management:

- Encourage the initial communication to come from your top leader and plan to do the work in putting together the information.
- Explain that it is the intention that the company approach wellness in a unified manner.
- Mention the 'why factor' behind building a wellness initiative in your organization. What's in it for management and for their employees?
- Discuss the overall goals and plans for the wellness initiative, and how management can provide support.
- The support of all levels of management is vital in encouraging employees to participate.
- Managers are welcome to express their concerns for the wellness initiative as it will help make the initiative stronger.
- Managers are encouraged to provide suggestions for employees that might be interested in becoming wellness champions for the initiative.
- Express that opinions and feedback are strongly encouraged, as this information has been communicated before all associates are informed.

## STEP 6: IDENTIFYING WELLNESS CHAMPIONS

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If you have garnered the support of your organization's leaders, it is time to identify who will help you in the cause. One thing is certain, successful wellness initiatives are driven by a team of people and not just one person trying to do it all. You need people to share the message about wellness throughout your workplace and encourage others to get involved. They do not need to be pictures of health, but motivated to lead a healthier lifestyle and interested in improving the culture of the workplace.

The number of wellness champions needed depends on your organization. If you have many departments, levels of staffing or diverse geographic locations, consider how your chosen wellness champions can make the biggest impact. Also think about including staff

members who are influential around their peers.

AchieveWELL will help guide you to better organize your wellness committee, but for now, focus on those key wellness champions you want to help drive the strategy behind your wellness initiative forward.

## STEP 7: QUICK SUCCESSSES

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Finding low-hanging fruit for wellness involves some investigation and strategy. Do not just start offering programs – plan for what might be a good fit and offers quick successes. Take the time to build the strong foundation and show early success. It will pay off later. Refer back to the ‘inventory sheet’ to get some ideas for activities that are already happening or would take less effort to implement as you build the initiative. Consider offering programs that are minimally disruptive to the flow of work. *You are not trying to solve the health problem at first, simply getting employees comfortable with the culture shift.*

Assess at this time what employees find interesting when it comes to a wellness initiative. The “Members Only” section of our website will offer you suggestions for an employee interest survey. Start thinking about potential wellness offerings that would appeal to the broad interests of most employees in your organization—this is about making everyone feel included.

## STEP 8: DEFINING EXPECTATIONS OF THE WELLNESS COMMITTEE

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You are off to a strong start if you have done the work on the front end and received the support of top management. Now start thinking about how to put the strategies in place that have the greatest chance for success and sustainability. Start with your champions. How will you assemble the group? Have you taken the time to define the expectations of your wellness committee? Start with the following points:

- How many people will be a part of your wellness team?
- Who will make up the team? (Consider diverse health/fitness levels and interests,

as well as diverse staff levels and departments)

- How often will you meet?
- Will you determine different roles within the committee?
- Have you looked at your company's mission statement to determine how you will build the mission statement for wellness?

## FINAL THOUGHTS

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This guide is by no means comprehensive, but will get you started in your quest to lay the foundation for wellness in your organization. As you read through each section, take the steps to meet the recommendations and know that the Wellness Council's fellow members, staff and Board of Advisors are all here to help guide you along the pathway.

## Wellness Council of Indiana

# PLANNING GUIDE: CREATING A WELLNESS VISION

Realistically, what are some issues you would like to address through a workplace wellness initiative?

<i>Issues to address through wellness</i>	<i>Ideas on how to address the issues</i>

What are the barriers to building a sustainable wellness initiative? Identify potential circumstances that could serve as boosters for wellness?

<i>Barriers</i>	<i>Boosters for wellness</i>

Realistically, in the first year, what would you like to see happening with your wellness initiative?

- 1.
- 2.
- 3.

What do you need to get wellness started in your organization?

- 1.
- 2.
- 3.

What will help to drive your wellness initiative forward?

- 1.
- 2.
- 3.

What is top management most interested in addressing through wellness?

- 1.
- 2.
- 3.

Can you identify any wellness champions in your organization that would add value to building the strategy for your wellness initiative?

<i>Person</i>	<i>Department</i>	<i>Valued skills, interests, expertise</i>

We encourage you to call us at the Wellness Helpline at (317) 264 2168, as we are here to support you and answer any questions you may have.